Implementing Oracle® Self-Service Human Resources 4.0

RELEASE 11i

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Thank you for helping us improve our documentation.
Preface
Implementing Oracle Self-Service Human Resources 4.0

Audience for This Guide

This Implementation Guide has been written to help implementation teams set up and configure Oracle Self-Service Human Resources (SSHR).

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Human Resources Management Systems
- Oracle Workflow
- Oracle Self-Service Web Applications
- Oracle HRMS System Administration
- Oracle HRMS Applications

If you have not yet been introduced to these applications, we suggest you attend one of the training classes available through Oracle University.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle SSHR.

- Chapter 1 introduces SSHR and its features
- Chapter 2 outlines the minimum steps you need to carry out to be able to run SSHR in a test environment.
- Chapter 3 illustrates how a typical SSHR function works using the Personal Information functions as an example.

The next five chapters explain the tools and general techniques you use to configure SSHR.

- Chapter 4 introduces the configuration tools used to configure SSHR and provides a generic configuration procedure.
- Chapter 5 looks at user access and security.
- Chapter 6 looks at configuring process flows using the Workflow Builder.
• Chapter 7 looks at configuring page layouts using the OA Configuration Framework.
• Chapter 8 looks at configuring approvals using the Workflow Builder and PL/SQL.

The remaining chapters cover in detail the specific configuration options available in each functional area.
• Chapter 9 covers common SSHR functions.
• Chapter 10 covers Employee Demographics functions.
• Chapter 11 covers Manage Employee Events (MEE) functions
• Chapter 12 covers the Views functions
• Chapter 13 covers Benefits and Individual Compensation Distributions (ICD)
• Chapter 14 covers the Payroll functions

• Appendix A is a checklist of the implementation and configuration steps for SSHR.
• Appendix B gives a sample of the user hook code for the New User Registration function.

Conventions

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code
require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

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You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Human Resources Management Systems.

If this guide refers you to other Oracle Applications documentation, use only the Release 11i versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF).

- **Online Help** – The new features section in the HTML help describes new features in 11i. This information is updated for each new release of Oracle HRMS. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini-pack as an upgrade, this document describes the new features. Online help patches are available on Metalink.

- **11i Features Matrix** – This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on Metalink.

- **Readme File** – Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related User’s Guides

Oracle Human Resources Management Systems shares business and setup information with other Oracle Applications products. Therefore,
you may want to refer to other user guides when you set up and use Oracle Human Resources Management Systems.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User’s Guide
This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle HRMS (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user’s guide online by choosing “Getting started with Oracle Applications” from any Oracle Applications help file.

Oracle Alert User’s Guide
This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer’s Guide
This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the Oracle Applications User Interface Standards for Forms-Based Products. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms–Based Products
This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the
Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications–embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow–enabled processes.

Guides Related to This Product

Using Oracle HRMS – The Fundamentals

Use this guide to learn about representing your enterprise on your application. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining a payroll, and also how to manage your costs.

Managing Your Workforce Using Oracle HRMS

Use this guide to learn about all aspects of managing your workforce. This includes how to represent your workforce on your application, recruiting new employees and developing their careers, and also defining and managing budgets.

Running Your Payroll Using Oracle HRMS

This user guide provides information about wage attachments, taxes and social insurance, the payroll run, and other processes.

Managing Total Compensation Using Oracle HRMS

Use this guide to learn about setting up the application to store and process information on your total compensation package, including salary administration, other earnings, deductions, benefits, absence management and PTO accrual plans.

Configuring, Reporting and System Administration in Oracle HRMS

This guide provides information about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.
Implementing Oracle HRMS
This guide explains the setup procedures you need to carry out in order to successfully implement Oracle HRMS in your enterprise.

Implementing Oracle Self-Service Human Resources (SSHR)
This guide provides information about setting up the self-service human resources management functions for managers and employees. Managers and employees can then use an intranet and Web browser to have easy and intuitive access to personal information and career management functionality.

Oracle Self-service Web Applications
This guide provides information on self-service applications in general.

Using Oracle Training Administration (OTA)
This guide provides information about how to set up and use Oracle Training Administration to facilitate your training and certification business.

Using Application Data Exchange
This guide provides information about using Application Data Exchange to view HRMS data with desktop tools, and upload revised data to your application.

Oracle Business Intelligence System Implementation Guide
This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS User Guide 11i
This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Using Oracle Time Management
This guide provides information about capturing work patterns such as shift hours so that this information can be used by other applications such as General Ledger.
Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications–wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle8 technology stack, and the Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user’s guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i. This guide describes the upgrade process and lists database and product–specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the applications file system and database.

Oracle Applications System Administrator’s Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to
define security, customize menus and online help, and manage concurrent processing.

Other Implementation Documentation

**Oracle Applications Product Update Notes**

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

**Multiple Reporting Currencies in Oracle Applications**

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle HRMS. This manual details additional steps and setup considerations for implementing Oracle HRMS with this feature.

**Multiple Organizations in Oracle Applications**

If you use the Oracle Applications Multiple Organization Support feature to use multiple sets of books for one Oracle HRMS installation, this guide describes all you need to know about setting up and using Oracle HRMS with this feature.

**Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup, and reference information for the Oracle Human Resources Management Systems implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

**Oracle Technical Reference Manuals**

The technical reference guides are now available in electronic format only. You can now access technical reference manuals for any Oracle Applications product you have licensed.
Oracle Manufacturing and Distribution Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes open interfaces found in Oracle Manufacturing.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Using Oracle FastFormula

This guide provides information about writing, editing, and using formulas to configure your system. Oracle FastFormula provides a simple way to write formulas using English words and basic mathematical functions. For example, Oracle FastFormula enables you to specify elements in payroll runs or create rules for PTO and accrual plans.

Using Oracle SSP/SMP

This guide provides information about setting up and using Oracle SSP/SMP to meet your statutory sick pay and statutory maternity pay obligations.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle HRMS and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network, Oracle University’s online education utility. In addition, Oracle Training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure,
Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.
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Or, send electronic mail to appsdoc_us@oracle.com.
CHAPTER 1

Overview of Self-Service Human Resources
Overview

Oracle Self–Service Human Resources (SSHR) extends the functionality of standard Oracle HRMS by enabling both employees and managers to participate in Human Resources management via a web browser. SSHR 4.0 offers secure self–service business transactions and easy–to–use functionality driven by Oracle’s proven web and workflow technologies. These technologies enable the data, views, stored procedures, validation routines, and APIs used in the standard Oracle Applications to be shared, thus providing seamless integration between Oracle HRMS and Self–Service HRMS.

What is SSHR 4.0?

The following sections answer common questions on SSHR and give an overview of the functionality.

What does self–service mean?

Self–service means that the originator of a task is also the person responsible for that task. Using a standard web browser, the user accesses HR data and performs a specific task, for example, registering a change of address. By transferring the responsibility for the task to the originator of the task, data accuracy is increased and administration costs are reduced.

How do self–service applications differ from traditional HR systems?

The key elements that distinguish self–service applications from other systems are:
- easy–to–use user interfaces
- easy access to functions via web browsers
- complex processes reduced to simple steps
- reliability and scalability enabling many people to experience good response times, for example during an annual benefit enrollment period
- opportunities to configure and extend the application to meet enterprise needs
- system accessibility for people who are not Human Resource specialists
- ability to configure SSHR web pages to suit user requirements.

What are the advantages to the HR Department?

Potential self–service activities in an HR department range from simple data entry tasks, such as updating personal and educational details, to
more complex tasks, such as informing employees of their current vacation allowance and providing policy advice. With SSHR, the person making an inquiry or wanting to change their personal details can find and manage this information themselves at little administrative cost to the HR department.

Another key advantage to the HR department is the accuracy of employee-maintained information. Employees have a vested interest in ensuring their information is accurate, for example, to ensure that their pay check is mailed to the correct address. Accurate and timely data is also vital for HR reports. For example, you could use data on the skills of your employees to create a report showing how these skills could be better deployed throughout the enterprise.

Non–HR managers often have direct contact with employees and customers and can make informed, expert, and quick decisions. Using SSHR, a manager can now make HR decisions even quicker. This can help reduce the number of rejected offers caused by delays in the recruitment process, and minimize the number of unfilled, non–productive vacancies. Managers can also search for people with the right skills if they have an unfilled vacancy, or find new work for an employee.

SSHR enables HR managers to publish information on job opportunities, company policies, and legislation advice to all employees. A new dialog can be created between management and employees which results in increased employee applications for jobs or training and increased accuracy of personal information stored on employees. HR management can now be so easily accessible that a virtual HR manager is always at hand.

**How can the HR Department control the self–service activities available to each user?**

The security controls – responsibilities, menus, and security profiles – used in standard Oracle applications also apply to self–service users. The seeded SSHR menus (Employee Self–Service and Manager Self–Service V4.0) are collections of functions intended for distinct audiences. The employee functions are constrained to operate only on the current self–service user’s record; the manager functions allow the user to select an employee from a list of available employees and carry out the required function.

The seeded SSHR responsibilities corresponding to each of these menus are useful for exploring the functionality delivered with the product, although they are not intended for production use. Instead, customers can configure their own variations of these menus and responsibilities, combined with appropriate security profiles, to restrict different groups of users to specific functions and employee groups.
The Configuration Framework and Workflow Builder tools offer considerable flexibility in controlling the user’s access to specific functions and require that users’ transactions are approved before they are committed to the database. You can also control the user’s access by configuring the base products. For example, Benefits eligibility profiles and enrollment requirements can determine which benefits an employee can select from within the Benefits Enrollment function.

How can SSHR meet my enterprise’s unique business processes?

SSHR is highly configurable: you can configure web pages and predefined business transactions. You can also create your own business processes. Although SSHR uses the design standards that are common to all Oracle applications, you can change the appearance of the web pages by adding your own logos and by changing field and radio button names. On some pages, you can choose which sections are displayed. If you want to highlight procedures that are specific to your enterprise, you can customize the instructions that provide online help for users.
Key Concepts in Self–Service Human Resources (SSHR)

This section defines some important terms used throughout this Implementation Guide.

Definitions

AOL function
An AOL function is an item that can be added to a menu. The item can call a screen or web page or be a hidden function.
See also: Self–Service Function

AK Dictionary
Alternative name for Web Applications Dictionary.

Business Process
Produces the products and services that are recognized outside the business area. They support the organization’s objectives, critical success factors, or business objectives. They can be subdivided into sub–processes, for example, the Change Hours workflow process consists of the Work Schedule and Pay Rate subprocesses.

Configuration Framework
The Configuration Framework allows you to configure the display of Oracle Self–Service Web Applications (OSSWA) without having to make any changes to the underlying code. Your configurations are stored in the Web Applications Dictionary and are preserved during upgrades.
See: The Configuration Framework: page 7 – 2

Oracle Applications (OA) Framework
The OA Framework is the technical foundation for the Oracle Self–Service Applications (OSSWA).

Region
A region in the Web Applications Dictionary defines a page, or part of a page, in Oracle Self–Service Web Applications. The region is defined in terms of region items such as fields and buttons.

Self–Service Function
Self–service functions appear as menu options to the SSHR user. The function determines how the self–service modules are called. For
example, the same self-service module is used for Personal Information from both the manager and employee menus but the function determines whether the module is called in Employee or Manager mode.

Self-Service Module
A set of dynamic web pages and related components (for example, workflow process and Web Applications Dictionary definitions, stored procedures). Examples include Personal Information, Competencies, and Assignment.

Transaction
A transaction is a logical unit of work such as a promotion or an assignment change. It may consist of several components, such as changes to salary, locations, and grade, but all the components of a transaction must be handled as a unit to be either approved or rejected.

Web Applications Dictionary
An active data dictionary that stores information on the appearance and behavior of self-service pages. Customers can configure changes to the Web Applications Dictionary using the Configuration Framework.

See: The Configuration Framework: page 7 – 2

Workflow Builder
Oracle Workflow is embedded within SSHR and manages the flow of information between the HR professional, the manager, the employee, and the applicant. You use workflow to control who and how these participants take part in HR processes by modifying the underlying process definitions.

See: Self-Service Workflows: page 6 – 2

Workflow Function
A workflow activity which is defined as a function and which maps to a PL/SQL procedure that is executed by the Workflow Engine when it encounters this activity in the workflow process.

See: Self-Service Workflows: page 6 – 2

Workflow Process
A workflow process is a series of activities linked by transitions. Each activity can be a function, a notification, or a subprocess.
Self–Service Modules

This section provides a brief description of the seeded SSHR modules.

Summary of SSHR Modules

### Common Modules

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Manager/Employee</th>
<th>Workflow chainable/Approvals</th>
<th>Localization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Person Process</td>
<td>Manager</td>
<td>No/No</td>
<td>Global</td>
</tr>
<tr>
<td>Manager Actions</td>
<td>Manager</td>
<td>No/No</td>
<td>Global</td>
</tr>
<tr>
<td>New User Registration</td>
<td>Both</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Review and Confirm</td>
<td>N/A</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Release Employee Information</td>
<td>Both</td>
<td>No/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Personal Actions</td>
<td>Employee</td>
<td>No/No</td>
<td>Global</td>
</tr>
<tr>
<td>Save for Later</td>
<td>Both</td>
<td>No/No</td>
<td>Global</td>
</tr>
</tbody>
</table>

### Benefits

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Manager/Employee</th>
<th>Workflow chainable/Approvals</th>
<th>Localization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits Enrollment</td>
<td>Both</td>
<td>No/No</td>
<td>Global</td>
</tr>
<tr>
<td>Individual Compensation Distributions</td>
<td>Both</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
</tbody>
</table>

### Career and Performance Management

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Manager/Employee</th>
<th>Workflow chainable/Approvals</th>
<th>Localization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appraisals (3.4)</td>
<td>Both</td>
<td>No/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Apply for a Job (3.4)</td>
<td>Both</td>
<td>No/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Module Name</td>
<td>Manager/Employee</td>
<td>Workflow chainable/Approval</td>
<td>Localization</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------</td>
<td>----------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Suitability Matching (3.4)</td>
<td>Manager</td>
<td>No/No</td>
<td>Global</td>
</tr>
<tr>
<td>Succession Planning (3.4)</td>
<td>Manager</td>
<td>No/No</td>
<td>Global</td>
</tr>
</tbody>
</table>

### Manage Employee Events

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Manager/Employee</th>
<th>Workflow chainable/Approval</th>
<th>Localization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment</td>
<td>Manager</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Change Location</td>
<td>Manager</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Change Manager</td>
<td>Manager</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Individual Compensation Distributions</td>
<td>Both</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Other Employment Information</td>
<td>Manager</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Pay Rate</td>
<td>Manager</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Special Information Types (SITs)</td>
<td>Both</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Termination</td>
<td>Manager</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Work Schedule</td>
<td>Manager</td>
<td>Yes/Yes</td>
<td>Global</td>
</tr>
</tbody>
</table>

### Payroll

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Manager/Employee</th>
<th>Workflow chainable/Approval</th>
<th>Localization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Payslip</td>
<td>Both</td>
<td>No/No</td>
<td>US, UK, Canada</td>
</tr>
<tr>
<td>Personal Payment Methods (Direct Deposit)</td>
<td>Both</td>
<td>No/Yes</td>
<td>Global</td>
</tr>
<tr>
<td>Online Tax Forms</td>
<td>Both</td>
<td>No/No</td>
<td>US</td>
</tr>
</tbody>
</table>
### Personal Information

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Manager/Employee</th>
<th>Workflow chainable/Approval</th>
<th>Localization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Details</td>
<td>Both</td>
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### Professional Details

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### Recruitment

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Training

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Views

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<tr>
<td>HR Views</td>
<td>HR Professional</td>
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<td>Global</td>
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</table>

Common Modules

The following generic modules provide common, low-level functionality that is reused in many of the higher-level functions.

Enter Person Process

The Enter Person process enables the user to:

- Select an employee from a searchable list of people
- Select an employee from their supervisor hierarchy
- Add and remove employees from their personal list of employees

A Simple Search enables to search for an employee by name. With an Advanced Search, a manager can search for a person or persons who meet particular criteria. You can search on personal, assignment or skills criteria.

See: User Access to People: page 5 – 2

Manager Actions

The Manager Actions module enables the user to first select a person and then the function, or action, to be performed. When the user selects the person, a context-sensitive list of available actions is displayed and the user can choose the required action from the list.

See: Navigation Paths: page 5 – 5
See: Actions Page: page 9 – 8
New User Registration

New User Registration enables users to register their own details for SSHR and for benefits providers. You set up a generic name and password and you can either enable users to create their own user name or you can use user hooks to create the user name automatically.

See: New User Registration: page 9 – 19

Personal Actions

The Personal Actions module is the employee equivalent of Manager Actions. The employee is presented with a list of actions that they can perform on themselves.

See: Navigation Paths: page 5 – 5
See: Actions Page: page 9 – 8

Release Employee Information

The Release Employee Information module enables an SSHR user to share information about themselves with another employee, often a manager, who would not normally have access to these records. For example, an employee may have requested a transfer to another group and the manager of the group may want to review the employee’s employment information before making a decision. An employee can revoke access to their information at any time – unless the application has been configured differently.

See: Release Employee Information: page 9 – 11

Review and Confirm

The Review and Confirm module shows details of transactions that a user has updated or details about pending transactions that require approval. The user can review the information displayed to ensure that all the details are correct before the changes are finally submitted to the database. If necessary, the user can return to the previous screen to change incorrect information.

See: Review and Confirm: page 9 – 14

Save for Later

The Save for Later module enables a user to interrupt a transaction before the data is submitted. The transaction is stored in the Actions Saved for Later table on the Actions page. The functionality also applies in the case of a timeout or system failure.

See: Save for Later: page 3 – 10
Benefits Modules

Benefit Enrollment

Benefit Enrollments enables an employee to:

- Review their current benefit enrollments
- Select benefits
- Add, update, or remove dependents
- Add, update, or remove beneficiaries
- Search for and select primary care providers

See: Self-Service Benefits Enrollments: page 13 – 2

Individual Compensation Distributions (ICD)

ICD enables managers to assign one-time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can combine ICD with the benefits modules if required.

See: Individual Compensation Distributions: page 13 – 40

Career and Performance Management Modules (SSHR 3.4)

For information on configuring the Career and Performance Management functions for SSHR release 3.4, see: Implementing Oracle Self-Service Human Resources 3.4 (available on Metalink).

Appraisals

The Appraisals module enables a manager and employee to evaluate employee performance and competencies and to set objectives and actions.

Apply for a Job

The Apply for a Job module enables employees to search for and apply for jobs, view job details, manage their resume, and prepare applications.

Suitability Matching

The Suitability Matching module compares and matches a person’s competences against a job or position.

Succession Planning

The Succession Planning module enables a manager to prepare an employee for a position and to plan a successor for the position.
Employee Demographics Modules

Personal Information

The Personal Information module enables users to update and maintain their personal records. The Personal Information module covers the following areas:

- Basic employee details
  See: Basic Details: page 10 – 6
- Address
  See: Main Address: page 10 – 9
- Other addresses
  See: Other Address: page 10 – 11
- Phone numbers
  See: Phone Numbers: page 10 – 14
- Employee dependents and beneficiaries
  See: Dependents and Beneficiaries: page 10 – 16
- Emergency contacts
  See: Emergency Contacts: page 10 – 18

The Personal Information module can also be chained with Special Information Types (SITs).

See: Personal Information: page 10 – 2

Professional Details

The Professional Details module enables users to maintain professional details. The Professional Detail functions are used by both employees and their managers. Certain functions can be restricted for manager access only.

The Professional Details menu contains the following functions:

**Education, qualifications**

The Educations and Qualifications module enables employees and managers to store details on their academic qualifications.

See: Education and Qualifications: page 10 – 22

**Other professional awards**

The Other Professional Awards module enables employees and managers to store details on professional qualifications.
Competence profiles
The Competence Profile module enables employees and managers to store information on skills and competences.

See: Competence Profiles: page 10 – 28

Work preferences
The Work Preferences module enables employees and managers to store information such as relocation preferences and travel preferences.

See: Work Preferences: page 10 – 32

Resume
The Resume module enables employees and managers to store a resume.

See: Resume: page 10 – 34

Tenure Tracking (US Public Sector)
The Tenure Tracking module enables managers to store information on an employee’s tenure (completion of professional criteria and extended probationary period).

See: Tenure Tracking: page 10 – 36

Academic Rank (US Public Sector)
The Academic Rank module enables managers to store information on the academic rank for employees within Higher Education.

See: Academic Rank: page 10 – 38

HR Modules

Manage Employee Events

The Manage Employee Events (MEE) functionality consists of a set of low-level, workflow-enabled components which can be chained together in various combinations to match your enterprise’s business processes. Some chained processes are predefined for you but you can use the Workflow Builder to configure others if you need to. The MEE components are as follows:

Assignment
The Assignment module enables a manager to change an employee’s assignment information.

See: Assignment: page 11 – 4
Change Location
The Change Location module enables a manager to change an employee’s work location.
See: Location: page 11–13

Change Manager
The Change Manager module enables a manager to transfer an employee to another supervisor, move the direct reports of one supervisor to another supervisor and to assemble a new set of direct reports to a new supervisor.
See: Change Manager: page 11–23

Individual Compensation Distributions (ICD)
ICD enables managers to assign one-time or recurring awards, bonuses, and allowances to qualified employees and individuals.
You can combine ICD with modules from Benefits and Payroll.
See: Individual Compensation Distributions: page 13–40

Other Employment Information
The Other Employment Information module enables you to update and retrieve assignment and employment information in assignment descriptive flexfields and localization-enabled flexfields.
See: Other Employment Info: page 11–19

Pay Rate
The Pay Rate module enables a manager to change an employee’s overall pay rate or update an individual component of the pay rate.
See: Pay Rate: page 11–21

Special Information Types (SITs)
Special Information Types enable you to store additional information that is not currently captured by the system. You can store information in the following categories: People, Jobs, Positions, Skills. There are also two US-specific categories: OSHA and ADA.
See: Special Information Types (SITs): page 11–16

Termination
The Termination module enables a manager to end an employee’s relationship with their employer. You can also use the Change Supervisor workflow process to reassign a terminated supervisor’s reports.

Note: You cannot reverse a termination in SSHR.
You can combine the Termination module with the ICD module to create a severance pay process if required.

See: Termination: page 11 – 8

Work Schedule
The Work Schedule module enables a manager to change an employee’s work schedule.

See: Work Schedule (Change Conditions and Change Hours): page 11 – 11

Views

Employee/Manager Views (3.4)
The Employee and Manager views offer the user access to specific information, for example, employment history, absence history, and salary history. Employees can view their own personal records and managers can view the records for the people they manage.

For information on configuring the Employee and Manager Views for SSHR release 3.4, see: Implementing Oracle Self-Service Human Resources 3.4 (available on Metalink).

HR Views
The HR Views module offers a summarized view of specific employee information: Personal Information, Assignment Details, Compensation Activity, and Termination History. This module is used by the HR Professional.

See: HR Views: page 12 – 2

Payroll Modules

Individual Compensation Distributions (ICD)

ICD enables managers to assign one-time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can combine ICD with Payroll to create processes for employee voluntary deductions.

See: Individual Compensation Distributions (Chapter 13)

Online Payslip

The Online Payslip module enables an employee to view their payslip using a Web browser. The payslip can only be viewed by the specific employee.

See: Online Payslip: page 14 – 10
Online Tax Forms

The Online Tax Forms module enables an employee to submit US Federal W-4 tax forms using a Web browser.
See: Online Tax Forms: page 14 – 13

Personal Payment Methods

The Personal Payment Methods module enables an employee to determine how they are paid. They can also view third-party payments.
See: Personal Payment Methods: page 14 – 3

Recruitment Modules (SSHR 3.4)

For information on configuring the Recruitment functions for SSHR release 3.4, see: Implementing Oracle Self-Service Human Resources 3.4 (available on Metalink).

Candidate Offers

The Candidate Offers module is used by managers to seek approval for a job offer, send it to an applicant, and track the applicant’s response.

Training Modules (SSHR 3.4)

For information on configuring the Training functions for SSHR release 3.4, see: Implementing Oracle Self-Service Human Resources 3.4 (available on Metalink).

Enroll in a Class

The Enroll in a Class module enables employees to choose to participate in training activities. Managers can also enroll their employees in training activities.

Cancel Enrollment

The Cancel Enrollment module enables employees and managers to cancel enrollment in a class.
SSHR Licences

To enable SSHR, you must first purchase the appropriate licence from Oracle. For information on licences, contact Oracle.

SSHR delivers Self-Service Benefits for program-based enrollments and Individual Compensation Distributions for rewards and voluntary contributions. Both features require the implementation of either the Standard Benefits or Advanced Benefits data model. Life event restrictions in the Advanced Benefits model allow you to use Self-Service Benefits at any time during the year.

**Note:** For Standard Benefits customers, it is recommended the Benefits Election function be available only during the annual enrollment period. In other words, you should consider taking your enrollment web pages off-line during periods where you do not want benefits participants to make changes to their elections.
Predefined Self–Service Responsibilities and User Menus

SSHR modules are accessible from predefined responsibilities, each with a corresponding top level menu.

In this version of SSHR, the predefined responsibilities are:

- Employee Self–Service V4.0
- Manager Self–Service V4.0
- HR User Self Service
- New User Registration

The predefined responsibility for the HR Foundation application is:

- HR Foundation

The additional responsibilities provided by OSSWA (Oracle Self–Service Web Applications are:

- Workflow User Web Applications
- Preferences

See: Oracle Self–Service Web Applications User Guide

Note: These responsibilities are provided as a starting point only. You should create your own responsibilities and menus using the predefined SSHR responsibilities and menus as examples. Otherwise, your changes may be lost during an upgrade.

See: User Access and Security: page 5 – 2

User Menus

SSHR includes several predefined top–level menus:

- Employee Self–Service 4.0
- Manager Self–Service 4.0
- HR Professional V4.0

The Employee Self–Service menu contains the functions that employees can perform on their own records, for example, the Personal Details function. The Manager Self–Service menu contains the same functions as the employee menu plus additional functions that the manager can carry out for the employees for whom they are responsible.

The HR Professional menu is available for HR professionals who wish to view summarized information on employees.
You can also use the following menu for administration purposes:

- HR Web Administrator

See: Self-Service Menus: page 5 – 9

Navigation Options for Functions

Both employees and managers can access functions in one of two ways. They can either use the above menus and select the function using the corresponding menu option or they can display the Actions page and select the required function from the list of available actions.

Legislation–specific Menus

SSHR provides legislation–specific menus to give users access to the functions that are specific to a country.

See: Self-Service Menus: page 5 – 9
CHAPTER 2

Getting Started with SSHR

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Getting Started with SSHR 2 – 1
Overview

This section gives you a brief overview of the minimum tasks you need to complete to set up SSHR.

See: Minimum Requirements for an SSHR System: page 2 – 3

For a list of all implementation steps, see Implementation Steps for SSHR: page A – 2
Minimum Requirements for an SSHR System

The following procedure gives you the basic implementation steps that are required to enable you to run SSHR in a test environment. For information on running SSHR in a production environment, please see the detailed chapters in this Implementation Guide and also the Appendix, which lists the implementation steps.

To set up an SSHR system:

1. Ensure that Oracle Human Resources 11i is installed with the most up-to-date patch according to the readme file for SSHR at the time of installation.

2. Ensure that at least one business group has been set up in Oracle HRMS with at least two employee records (one record should be defined as the supervisor for the other).

   See: Adapting and Creating a New Business Group (Oracle HRMS Applications User Guide)

3. Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the Oracle Self-Service Web Applications Implementation Manual (available on Metalink).

4. Apply the patch for SSHR 4.x and make sure that all prerequisites are met, including those for the OSSWA Framework.

5. Complete the install and set-up of the OSSWA Framework.

   See: Configuring and Troubleshooting Oracle HTTP Server with Oracle Applications (available on Metalink – technical note number: 139863.1)

6. If you have licensed SSHR, set the following profile option to “Yes” at the site level.

   • HR: Self Service HR Licensed

   See: User Profiles (Oracle HRMS Applications User Guide)

   If you have not licensed SSHR, please contact Oracle for information on purchasing a licence.

7. Add the Manager Self Service and Employee Self Service responsibilities to your users (use either new or existing users).

   See: Self-Service Responsibilities and User Menus: page 1 – 19

   See: Responsibilities (Oracle HRMS Applications User Guide)

8. Link the users to (new or existing) employee records in HRMS.

   See: Defining User Access and Menus: page 5 – 12
See: Users Window (Oracle Applications System Administrator’s Guide)

For information on a typical SSHR function, please see: Understanding a Typical SSHR Function: page 3 – 2
Understanding How SSHR Functions Work
Understanding a Typical SSHR Function

This chapter examines a typical SSHR function, Personal Information, and introduces the underlying concepts.

By following the functional flow of the Personal Information function, you should understand how information is passed from the web browser to Oracle Applications, how Workflow is used by SSHR, how the page layout is controlled by the Web Applications Dictionary and the Configuration Framework, and how the approvals process operates. The general principles described here can be applied to any other SSHR function.

The chapter includes an example of a typical SSHR Web page to illustrate the different elements that you can configure.

The configuration steps for SSHR functions and their web pages are discussed in detail in the subsequent chapters of the Implementation Guide.
How an SSHR Function Works in SSHR 4.0

The following flowchart and accompanying text describe the functional flows that occur when a user changes a main address using the Personal Information function.

1. User clicks Personal Information (PI)
2. The application calls the workflow service with a parameter specifying the PI workflow process for the workflow item type.
3. The HR workflow service creates an instance of the (PI) workflow process for the item type.
4. Oracle Workflow runs the activity within the PI subprocess within the PI workflow process.
5. The application calls the generic HR Workflow function.
6. The page is defined by Web Applications Dictionary, flexfields, and the Configuration Framework. FND data security ensures the function is permitted for the business group.
7. The user clicks Update to change the address.
8. If no address changes are awaiting approval, or if no future address changes exist, the Details page is displayed. The user corrects an existing address or enters a new one.
9. If the user enters a new address, the Entry page is displayed. The user can save the information for later.
   - If the user corrects an existing address, the existing Address information is displayed.
10. Field-related errors are flagged by a JSP stored on the client. The user corrects the info.
11. The data is sent from the client to the server and validated by HR APIs. The Review page is displayed.
12. The Review Page displays the information. The user can modify the information by choosing the Make Changes button.
13. When complete, the user clicks Submit Information.
14. Approval levels and approvers are defined. You can define approvers/notifications recipients.
15. If the function is configured for update (without approval), the new data is inserted into the HR tables.
16. If the Address requires Approval, the data is inserted into HR tables and the Approvals process begins.
17. The workflow item is routed for approval.
18. When the transaction is approved, the data is loaded into HR tables. If returned for correction, it is displayed in the Actions page. If rejected, the user is notified and the transaction is deleted from the transaction tables.
1. The user chooses the Personal Information function from the user menu.

2. The application calls the HR workflow service (OA.jspsOA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800) with a parameter specifying the Personal Information workflow process for the workflow item type (HR_MAINT_PERSONAL_DETAILS_PRC).

   See: Self-Service Workflows: page 6 – 2

3. The HR workflow service creates an instance of the Personal Information workflow process for the item type.

   The FND data security is checked to make sure that this function is permitted for the legislation code of the current employee’s business group. Personal Information is a global function that is available for all legislation codes.

   See: User Access and Security: page 5 – 2

4. Oracle Workflow runs the Maintain Personal Information activity (HR_PERINFO_OVERVIEW_JSP_FCT) within the Personal Information subprocess (HR_PROCESS_PERINFO_JSP_PRC) within the Personal Information workflow process (HR_PERSONAL_INFO_JSP_PRC).

5. The application calls the generic HR_WORKFLOW_SERVICE.BLOCK function. The HR Activity Type Value workflow attribute for this process activity is set to HR_OVERVIEW_TOP_SS with the Activity Type as JSP.

6. A page is displayed based on the definition of the HR_OVERVIEW_TOP_SS region in the Web Applications Dictionary and its nested subregions. The page is influenced by any context-sensitive flexfields and the cumulative effect of any Configuration Framework configurations that relate to these regions.

   See: The Configuration Framework: page 7 – 2

7. If no past address changes are awaiting approval or correction, or if no future-dated address changes exist, the Details page is displayed. The user specifies whether they want to correct an existing address or enter an entirely new one.

   The button displayed to the user will be either Update/View Future Changes or View Pending Approval.

8. If the user chooses to enter a new address, the Entry page is displayed. The user enters the information.
If required, the user can save the information and submit the transaction later. In this case, the changes entered so far are saved to the transaction tables without server-side validation.

See: Save for Later: page 3 – 10

If the user chooses to correct an existing address, the existing Address information is displayed. The user corrects the information.

9. When the user has entered the information (or is ready to complete the transaction), they click the Continue link at the bottom of the page. Any field-related errors (bad formatting, missing fields, and so on) are flagged by a JavaScript procedure stored on the client and the user is asked to correct this information.

10. Web page data is sent from the client to the server and server-side validation is performed by HR Application Programming Interfaces (APIs). If all fields are validated, the Review page is displayed.

See: Review and Confirm: page 9 – 14

11. The Review page displays the information that the user has entered. If the user now wants to modify the address information, they can choose the Back button to return to the update page to make changes.

12. When the changes are complete, the user returns to the Review page and clicks the Submit Information link to save the changes.

13. The number of approval levels and approvers is determined by the configuration of Dynamic Approvals. If applicable, the user can insert additional approvers and/or notification recipients.

See: Dynamic Approvals: page 8 – 2

14. If the Main Address part of the Personal Information function is configured for update without requiring approval, the new address data is inserted directly into the HR tables. (This step is the same process as step 18 for changes requiring an approval.)

15. If the Main Address part of the Personal Information function is configured to require approval, the data is inserted into HR transaction tables and the Approvals process begins for that item.

16. The workflow item is routed for approval according to the configuration of the Approvals process.

17. The approver can either approve or reject the transaction or return it to the user for correction.

If the transaction is returned for correction, it is displayed for the user in the Actions Saved for Later table in the Actions page. The
user can reopen the transaction. The previous values are reloaded from the transaction tables ready for the user to make the required changes and resubmit.

See: Save for Later: page 3 – 10

When the approver approves or rejects the transaction, the user is notified of the transaction status and the transaction details are deleted from the transaction tables. If the transaction is approved, the data is loaded into the HR tables.
A Typical SSHR Web Page

The following diagram shows a sample web page for the Personal Information function. The different elements that you can configure in the Configuration Framework are listed below.

Figure 3 – 1 Sample Web Page

The graphic above shows the following elements which you can configure using the Configuration Framework:

1. Enable configuration
2. Change the sequence of fields
3. Enable the user to update fields
4. Rename region items
5. Configure table views

See: The Configuration Framework: page 7 – 2
Managing Dates in SSHR

Effective Dates

If a user is prompted to enter an effective date, the application validates the entry to make sure the data is correct using specific criteria. The system date is the default date unless a future-dated assignment change has already been entered into the system. If a future-dated change has been entered, the day after the change date is used.

The following checks are then carried out in a chained process:

- **hire_date**
  Checks if the effective date entered is earlier than the hire date

- **termination_date**
  Checks if the effective date entered is earlier than the termination date

- **future_assignment**
  Checks if there are any future assignment changes with respect to the effective date entered

- **pending_workflow**
  Checks if there are changes pending in the workflow tables for the selected person

- **correction_mode**
  Issues a warning (alert) only if the latest effective date of the primary assignment is less than the SYSDATE

Future-Dated Changes

It is possible that an SSHR user may try and update information when a future-dated change is pending. This action triggers the following process:

- The application sends the user a message instructing them to contact their support representative
- The user is prevented from making any changes
- The workflow error process sends a message and description to the Sysadmin ID informing them that an attempt was made by a user to update information with a future-dated change pending
You then decide how to manage the update requested by the user. For example, you could cancel the future–dated change, implement the requested change to information, and then implement the future–dated change again. Alternatively, you can send a notification explaining that the update will be made at some point in the future.

**Note:** A system administrator or other implementor of Self–Service Benefits can access the Change Session Date menu option for testing future dated enrollments. You should remove this menu item in your production environment so that benefits participants do not alter their enrollment date. To remove the Change Session Date item from the menu, query the BEN_SELF_SERVICE_BENEFITS menu option in the Menus window and delete the Change Session Date menu entry.
Save For Later

The Save for Later functionality enables a user to interrupt transactions before they are complete and save them so that they can be completed at a later point.

In addition, approvers can return transactions to the initiator for correction. In this case, the initiator can reopen the transaction, correct the information, and resubmit it for approval. The approvers can include informational notes to clarify the reason for returning the transaction.

Both suspended transactions and returned transactions are displayed in the Actions Saved for Later table on the Actions page.

Users can also access their saved functions using the All Actions Saved for Later menu option on the employee and manager menus.

Figure 3 – 2 Save for Later Functionality

The graphic above shows the two different ways in which transactions can be saved for later.

Route 1: When a user initiates a self-service transaction, they can either submit the transaction for approval immediately or save the transaction for subsequent processing. If the user submits the transaction immediately, the transaction is subject to the usual approval processes. If the user chooses to save the transaction for later, it is
suspended and the user can restart it or delete it from the Actions Saved for Later table in the Actions page.

Route 2: When a user has submitted a transaction for approval, the approver can either approve the transaction, reject the transaction, or return it for correction. If the approver returns the transaction for correction, the initiator can subsequently restart or delete it from the Actions Saved for Later table in the Actions page of the initiator.

**Note:** If a transaction is interrupted due to user inactivity, a timeout, or a system failure, the interrupted transaction is also stored as a suspended transaction.
CHAPTER

4

Configuring SSHR
Configuration Overview

All Oracle Self-Service Applications, including the SSHR modules, are built on the Oracle Applications (OA) Framework to enable maximum flexibility. Although the SSHR modules are delivered with predefined settings which meet the HRMS requirements of the majority of enterprises with little or no configuration, there are many configuration options available to ensure that all your enterprise requirements are met.

This chapter provides an overview of the different configuration steps for SSHR and introduces a common configuration method that you can apply to any SSHR module in conjunction with the function-specific configuration steps. For detailed information on the configuration steps, see the following chapters:

- Managing User Access – Chapter 5
- Configuring Process Flows – Chapter 6
- Configuring Page Layouts – Chapter 7
- Approvals – Chapter 8

Guidelines for Configuring SSHR Functions

The best approach to take when configuring SSHR is to first configure a sample function, test it until you are satisfied with the results, and then repeat the steps for the other functions.

Start your configuration process by configuring a module for a particular group of users. It is important to consider both the module and the intended audience at the same time because, if required, you can configure multiple variations of the same module to suit different groups of users. For example, you might choose to implement one version of the Personal Information module for all employees, another version for one set of managers, and another version for a second set of managers.

User Access

You make your new version of the SSHR module available to your target group of users by creating an AOL function and attaching it to a menu. The menu is attached to a responsibility which you assign to your users.

You specify whether the AOL function is restricted to the employee’s own records or whether a manager can use the function to select from a list of employees.
For each responsibility (or combination of responsibility and user), you need to define a security profile to restrict the user to an appropriate business group and, if required, a subset of a business group. A typical subset would be all employees in a specific organization or all employees reporting to the current user.

You also need to consider whether to allow users to access people in other business groups and whether users can access additional people who may grant them access to their records using the Release Employee Information function.

See: User Access and Security: page 5 – 2

Process Flows

If the SSHR modules are workflow–enabled (see: Summary of SSHR Modules table: page 1 – 7), you can choose to modify the predefined process flow if required. For example, you can chain two modules together (where permitted) or introduce additional branching logic.

See: Self–Service Workflows: page 6 – 2

Approvals

You must decide whether changes that users make using your modified function are subject to approval and who the approvers are. You can either use the Workflow Builder or PL/SQL, or both, to control transaction approvals.

See: Approvals: page 8 – 2

Page Layouts

In most cases, the predefined page layouts contain all the fields that users need to perform a transaction. However, you may decide that some changes are required. For example, you could change the field prompts to match terminology used by your enterprise. You can also add more detailed instructions to the web pages, display selected flexfield segments, and hide fields or sections of web pages.

You modify page layouts using the Configuration Framework and, occasionally, the Web Applications Dictionary.

See: The Configuration Framework: page 7 – 2

Module–specific Configuration Options

Detailed information on the configuration options for each module is given in the corresponding sections. Each section contains the following information:
• menu and function names
• workflow process names and attributes
• region, tip, and instruction names
• profile options
CHAPTER 5

Managing User Access
User Access and Security

SSHR uses the same security mechanisms as Oracle HRMS applications. By defining user profiles, security profiles, responsibilities, and menu structures, you can control who uses SSHR, which information they can access, and how they access it.

See: Security Overview (Oracle HRMS Applications User Guide)

The purpose of this chapter is to identify the key concepts relating to SSHR user access and security and to provide information on how to apply these concepts to address the needs of your enterprise.

Responsibilities

A responsibility combines low–level elements of user access configuration to control which functions the user can access (User Access to Functions) and on whom they can perform these actions (see User Access to People).

You define responsibilities in the same way as you define responsibilities for Oracle HRMS applications.

Note: When you define your responsibilities, make sure they are available from Oracle Self–Service Web Applications.

See: Responsibilities (Oracle HRMS Applications User Guide)
See: Oracle Applications System Administrator’s User Guide

User Access to People

The primary users of SSHR can be divided into two main groups: managers and employees (non-managers).

Employees (non–managers)
Employees can only access their own employee records.

Managers
Managers can process the records for other employees after selecting them from the People Search page.

Person Search

The Person Search page contains several tabs which are defined by the Employee’s Menu menu.

Hierarchy
This page presents a hierarchical view of the employees reporting to the current user. The view is based on the supervisor hierarchy.
My List

This page contains a user–defined list of people for quick reference.

Search (Basic and Advanced Search)

This page enables a manager to search for any employee within the underlying security profile.

Note: You can extend the security profile for managers by enabling the Release Employee Information function.

See: Release Employee Information: page 9 – 11

The manager can process employees in the list directly or add them to My List for future reference.

Configuration Options

You can control user access to the People Search functions by excluding certain functions if required, for example, you can hide the Person Search function so that managers can only process the records for the employees displayed in their hierarchy.

See: Defining User Access and Menus: page 5 – 12

You can also control how managers search for employees by assigning profile options. For example, you can apply the Cross Business Group profile option to enable managers to search for employees across business groups.

See: User Profiles (Oracle HRMS Applications User Guide)

Security Profiles

SSHR uses security profiles to control a user’s access to employee records. For example, a security profile can give a manager access to the records for all the employees in the department.

See: Security Profiles (Oracle HRMS Applications User Guide)

Employees (non–managers)

You can use the default View All security profile for the corresponding business group for the employee (non–manager) responsibilities because the employee functions restrict the user to accessing only their own record.

Managers

If you allow your managers to access the Search functions, you must create suitable security profiles. For most SSHR managers, the most appropriate security profile is a user–based profile with the Supervisor
Hierarchy check box flagged. This security profile dynamically generates the list of available employees based on the supervisor hierarchy (starting with the current user). Supervisor–based security allows you to set up a single security profile and use it for multiple users. To activate supervisor–based security, flag the Restrict by Supervisor check box in the Security Profile window.

See: Defining a Security Profile (Oracle HRMS Applications User Guide)

Alternatively, you can choose to disable the Search functions for an SSHR manager responsibility. In this case, you can assign the View All security profile to the users.

Release Employee Information

You can supplement the list of people who appear in a security profile by enabling the Release Employee Information function. With this function, users can allow other users (who are outside of the security profile) to access their records. Similarly, managers can use the Release Employee Information to allow a second manager (who is outside of the security profile) to access the records for one of their employees.

To illustrate a typical use of this function, imagine that an employee wants to transfer to another organization. The new manager may need to review the employee’s absence history before the transfer can take place. However, this manager may be outside the employee’s current business group and would therefore be restricted by HRMS security access. The manager cannot access the employee’s data from a Person Search because of the defined security profiles. With the Release Employee Information function, the employee granting access can search for the manager’s name across all organizations and business groups and grant access to that person. This enables the manager to view the employee’s absence history. However, you must ensure that the manager has a responsibility that satisfies the following conditions:

- includes appropriate manager functions, for example, Manager Views
- is associated with a security profile which has the “Allow Granted Access” check box flagged.

If you want managers in your enterprise to have the same privileges for granted employees as for other employees who work for them, you can simply enable the “Allow Granted Access” option on the security profile they use with their main Manager Self Service responsibility. Alternatively, you may choose to limit managers’ capabilities with respect to granted employees. For example, you may restrict managers to selected views and not allow them to use functions such as
Termination. To do this, disable the "Allow Granted Access" check box for the main security profile and enable the check box for a separate security profile with a reduced set of functions.

See: Release Employee Information: page 9 – 11

User Access to Functions

You control user access to specific functions using function security. Functions are attached to menus which are then attached to responsibilities.

Navigation paths

The traditional navigation path for SSHR users is to select a function, for example, Personal Information or Change Manager, directly from a user menu. SSHR 4.0 continues to support this approach but also introduces a new navigation path which uses the Actions pages.

Accessing functions from the Actions pages:

Instead of selecting a specific function from the menu, the user selects either the Personal Actions function (for employees) or the Manager Actions function (for managers). SSHR displays a context-sensitive list of available functions.

**Personal Actions**

The Personal Actions page consists of several tabs which are defined by the Employee Enter Process hidden submenu.

See: SSHR Menus: page 5 – 9
See: Actions Page: page 9 – 8

The My Actions tab displays a list of available functions for the employee. To generate this context-sensitive list, SSHR takes the submenu defined in the HR:Personal Actions Menu profile option and excludes any legislation-specific functions that do match the legislation code of the user’s business group.

**Manager Actions**

The Manager Actions page consists of several tabs which are defined by the Manager Enter Process hidden submenu.

See: SSHR Menus: page 5 – 9
See: Actions Page: page 9 – 8

The Employee Actions tab displays a list of functions available for the employee selected in the Employees tab. SSHR derives the list of
functions by taking the submenu defined in the HR:Manager Actions Menu profile option and excluding any legislation–specific functions that do not match the legislation code of the selected employee’s business group.

**Note:** If the manager first selected their own record, the submenu is derived using the HR:Personal Actions Menu profile option.

Accessing functions directly from a menu:

**Managers**

When a user selects a manager function directly from the menu, they are first presented with the Person Search page. From this page, they can select an employee for processing. The user is then taken to the corresponding web page for the function.

**Note:** Data security starts after the user has selected an employee. If the function is specific to a legislation other than the legislation to which the selected employee belongs, an error message is displayed.

**Other Employees**

When a user selects an employee function directly from the menu, they are taken directly to the corresponding web page for the function.

**Note:** Data security is checked after the user has selected a function. If the function is specific to a legislation other than the legislation to which the user belongs, an error message is displayed.

**Legislation–specific Functions**

Most SSHR functions are global and can be used on employees in any legislation. However, some functions are legislation–specific and must be restricted to employees in the corresponding legislation.

SSHR uses FND Data Security to enforce this restriction. A data security object has been defined on the combination of person and legislation and data security menus have been created for predefined functions. There is one data security menu for global functions and one for each legislation code. The predefined functions are associated with either the global data security menu or with one or more of the country–specific data security menus as appropriate.

Data security grants have been predefined associating each data security menu with the appropriate legislation code (or with all legislation codes in the case of the global menu). The effect of each
grant is to enable the functions attached to the corresponding data security menu for people in business groups having the corresponding legislation code.

For example, a function on the global data security menu may be used with any employee but a function that is only on the US data security menu may be used only with employees in a US business group.

In addition to the data security menus that are available for predefined functions, there is a similar set of data security menus to which you can attach your custom functions. The data security grants are already in place.

See: Data Security Menus: page 5 – 10

Users and Responsibilities

You define SSHR users in the same way as you define users for Oracle HRMS applications.

See: Users Window (Oracle Applications System Administration Guide)

However, the Person field of the Users window is particularly important for SSHR as it acts as the link between the professional forms interface and SSHR. It ensures that the user name is linked to the correct employee records. For example, if you were to create a user and assign an SSHR responsibility to this user, the correct employee records would only be displayed in SSHR if the user’s name is entered in the Person field.

See: Responsibilities (Oracle HRMS Applications User Guide)

New User Registration

The New User Registration functions enable new users to register their own details and create their own users for SSHR. You can also add a user hook which generates the user name when the user clicks a button on the web page.

You can enable the New User Registration functions for both employees and non–employees. The non–employee registration form is usually used in conjunction with Advanced Benefits.

See: New User Registration: page 9 – 19

User Profiles

You apply user profiles to control how the SSHR application runs. You can set profile options at site level, application level, responsibility level, and user level. The individual profile options are specified in the sections on each module.

See: User Profiles (Oracle HRMS Applications User Guide)
User Access to Functions

Manager and Employee Functions

You can control which functions employees and managers can access by adding or removing functions from the user menus. For example, you could restrict employee access to the Termination function by only including it in the Manager menu.

See: Defining User Access and Menus: page 5 – 12
Self–Service Menus and User Access

SSHR uses four types of menu: top-level menus, submenus, hidden submenus, and data security menus. The following section looks at each of these menus in detail.

The predefined menus are overwritten whenever an SSHR patch is applied so any changes you have made to the menus are lost. For this reason, you should create at least one top-level menu for employees and at least one for managers.

Note: You can avoid having to configure several similar menus by adding all employee and manager functions to each of your menus and then defining menu exclusions against the responsibility to exclude specific functions from groups of users.

See: Defining Menus for SSHR: page 5 – 12

Types of Menus

Top–level Menus

The top–level menus define the choices that the user sees on their menu when they log in to SSHR. For example, the top–level menu for the Employee Self–Service responsibility is the Employee Self Service V4.0 menu.

See: Defining User Access and Menus: page 5 – 12

Submenus

Submenus group together functions in a logical group on the top–level menu, for example, the Professional Details functions are grouped together in the Manager Professional Details submenu. The predefined submenus for SSHR include:

- Manager Professional Details
- Benefits Self–Service

Hidden Submenus

By attaching a submenu to the top–level menu without defining a prompt, you can assign functions to the responsibility but hide them from the user. This means that the user cannot select these functions directly. The following hidden submenus are predefined for SSHR:

- Manager Enter Process
- Manager Actions Menu
• Personal Actions Menu

SSHR uses these submenus to determine the availability of functions in other places. For example, the Manager Enter Process submenu controls the tabbed regions appearing on the Manager Enter Process page. The Manager Actions menu controls which functions are available on the Actions page for a manager to perform on other employees. The Personal Actions menu controls which functions are available to a user on the Personal Actions page. This menu also controls which functions are available from the Actions page when the manager selects their own record.

Data Security Menus

SSHR uses the data security menus to determine which functions are global and which are for specific legislations.

The data security menus for SSHR are:

• HR_GLOBAL_SS_FUNCTIONS_SEED
  Contains all the functions that are accessible across legislations (global functions)

• HR_cc_SS_FUNCTIONS_SEED (where cc is legislation code)
  Contains all the functions that are specific to a legislation

• HR_GLOBAL_SS_FUNCTIONS_CUSTOM
  Contains customer functions that are accessible across legislations

• HR_cc_SS_FUNCTIONS_CUSTOM (where cc is the legislation code)
  Contains customer functions that are specific to a legislation

See: Legislation–specific Functions: page 5 – 6

Menus for Employees (Non-Managers)

If you create a new Employee menu and want to use the Personal Actions functionality, you need to add the following submenus to your new menu:

• Employee Enter Process Menu (or your configured copy of this menu)

• Personal Actions Menu (or your configured copy of this menu)

You must also add the following functions to your new menu:

• Personal Actions V4.0 (or your configured copy of this menu)
• Suspended Actions V4.0

You must also make sure that the value for the HR:Personal Actions Menu profile option for any responsibilities that use the new employee menu to match the names of the personal actions submenus you selected above.

Menus for Managers

If you create a new Manager menu and want to use the Manager Actions functions, you need to add the following submenus to your new menu:

• Manager Enter Process Menu (or your configured copy of this menu)
• Personal Actions Menu (or your configured copy of this menu)
• Manager Actions Menu (or your configured copy of this menu)

You must also add the following functions to your new menu:

• Manager Actions Tree View V4.0 (or your configured copy of the function)
• Suspended Actions Mgr V4.0

You must also make sure that the values for the HR:Manager Actions Menu and HR:Personal Actions Menu profile options for any responsibilities that use the new manager menu to match the names of the manager actions and personal actions submenus you selected above.
Defining Menus for SSHR

The predefined self-service responsibilities are linked to a menu that contains a number of functions. We recommend that you create a menu based on the predefined menus and, if necessary, add or remove functions so that the menus accurately reflect your organization’s structures and business processes. You can base your configuration on the sample menus provided although you should not change the predefined menus directly.

You configure menus in the Menus window.

To set up menus for self-service:

1. Review the sample functions in the Employee Self-Service User Menu and the Manager Self-Service User Menu. Decide which functions you want to include in your user menus.
   
   See: Self-Service Responsibilities and User Menus: page 1 – 19
   
   See: User’s Menu (Oracle Applications System Administrator’s Guide)

2. Create your own menu based on the predefined menus.

3. Make sure that all the functions you require are listed in the Function column of your menu.

4. Make sure the following submenus are attached to your custom menu:
   
   • Employee Enter Process menu – for employee and manager menus
   
   • Personal Actions menu – for employee and manager menus
   
   • Manager Actions menu – for manager menus

5. Make sure that the following functions are attached to your custom menu:
   
   • Personal Actions V4.0 (or a configured copy) – for employee menus
   
   • Manager Actions V4.0 (or a configured copy) – for manager menus
   
   • Suspended Actions – for employee and manager menus

6. Save your work.
Defining User Access to Self-Service Functions

To define user access to self-service functions, you need to define a user, assign a responsibility, assign profile values, and assign a menu to the responsibility. The following process takes you through the separate procedures.

We recommend that you create a different responsibility for each target group of users.

► To define a responsibility for a self-service application:

1. Follow the standard procedure for creating a responsibility.
   See: Defining a Responsibility (Oracle Applications System Administration Guide)
2. Define your responsibilities to be available from Oracle Self-Service Web Applications.
3. Consider whether you should create menu of function exclusions to restrict the employee menus.

► To set your system profiles:

1. Set the system profiles for security groups.
   If Security Groups are not enabled, use the System Profile Values window to link your responsibility to a security profile in the appropriate Business Group.
   If Security Groups are enabled, you can set the security profile at the user level using the Assign Security Profiles window.
   **Note:** Self-Service Benefits users: If you do not link your responsibility to your business group using the HR:Security Profile, any benefits participants who attempt to enroll will receive an error message indicating that they cannot enroll.
2. Set any additional required profiles.
   • HR: Security Profile
   • HR:Cross Business Group (if you want users to be able to select employees from different business groups in lists of values)
   • HR:Restrict Transactions across Business Groups in SSHR (if you want to stop your users from performing transactions on employees from different business groups. This profile option works together with the HR:Cross Business Group profile option).
   • HR:Personal Actions Menu (for SSHR)
• HR: Manager Actions Menu (for SSHR)

**To define a user:**

1. Define the people you would like to access Self-Service. There are two ways to do this. You can follow the typical steps for defining a new user and then assign each individual user to a responsibility that enables access to self-service benefits.

   See: Users Window (*Oracle Applications System Administrator’s Guide*)

   Alternatively, you can set up concurrent programs to automate this manual process.

   See: Creating Batch User Accounts with Concurrent Programs: page 5 – 20
Defining Functions for SSHR

If required, you can create your own SSHR functions using the predefined functions as a basis.

You can then configure how the function is accessed, for example, whether it is available from the Actions pages or from the People Search pages.

For information on modifying the related workflow processes, see Configuring Workflow Objects: page 6 – 5

You create the function in the Form Functions window using the system administrator responsibility.

To create a function based on a predefined SSHR function:

1. Query the function on which you want to base your function, for example, Personal Information V4.0 (HR_PERINFO_SS).
2. Insert a new record beneath it in the table.
3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above.

   **Note:** The Function Name and User Function Name fields must be unique so insert your standard prefix in front of the value duplicated from the previous record.

4. In the Parameter field, note that the pItemTypes parameter value is 'HRSSA' (the internal name for the predefined HRMS Self Service workflow item type). Leave this value unchanged but change the pProcessName parameter from HR_PERSONAL_INFO_JSP_PRC to the name of your configured process.

   See: Self-Service Workflows: page 6 – 2

5. Note that the HTML call field is OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_PERINFO_SS. Change the OAFunc parameter to your configured function name.

To make the function available globally or for specific legislations:

1. If this function is for a specific legislation, add it to the appropriate HR_cc_SS_FUNCTIONS_CUSTOM data security menu. Otherwise, add it to the HR_GLOBAL_SS_FUNCTIONS_CUSTOM data security menu.

   **Note:** You do not need to enter a prompt for the function. Also, make sure that the Granted check box is unchecked.
2. Save your work.

► To add the function to an employee menu in the Menus window:
   1. Use the system administration responsibility to display the Menus window.
   2. Add the function to the top-level menus and/or submenus as appropriate. For example, you may want to add the function to your configured copy of the Employee Self-Service V4.0 menu.
      
      See: Defining Menus for SSHR: page 5 – 12

► To make a function available from the Actions pages:
   1. If this function is appropriate for employees to perform on themselves, add it to your configured copy of the Personal Actions menu.
   2. If this function is appropriate for managers to perform on other employees, add it to your configured copy of the Manager Actions menu.
      
      Note: You only add the employee version of the function to the Manager Actions menu.

► To make a function available from the Manager menus via the People Search page:
   To make this function available to managers directly from the menu via the People Search page, you need to create a matching function. Model your matching function on the corresponding predefined manager function.

   You create your matching function in the Form Functions window.
   1. Query the predefined manager function on which you want to base your function, for example, Personal Information Manager V4.0 (HR_PERINFO_MGR_SS).
   2. Insert a new record beneath it.
   3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above. Insert your standard prefix where required.
   4. In the Parameter field, change the pCalledFrom parameter to match the name of your original custom function (as created in the above procedure)
      
      The HTML call field is OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionA
Managing User Access

5. Save your work.

6. Add the function to the top-level menus and/or submenus as required.

   **Note:** There is no need to add this type of function to the data security menus or to the actions menus.
Batch Creation of User Accounts

Every Oracle HRMS user needs to be registered with a user name, password and responsibility. The creation or deletion of these user accounts can often be time consuming, particularly if you are restricting a user’s access with a responsibility associated with a security profile and a menu.

A set of concurrent programs have been created for Oracle HRMS applications to automate the creation and management of large groups of user accounts. These programs are particularly useful if you have to create a large number of user accounts at initial installation, for managing new hire user accounts, or for managing accounts for terminated employees. The concurrent programs are:

- User Account Employee Extract Process
- Data Pump Engine
- Data Pump Batch Exceptions Report

Before you can use the concurrent programs however, you must write custom logic to reflect your enterprise’s unique business rules. A user hook in the hr_user_acct_api is provided for you to do this.

You can find sample user hook code in the following package:

- $PER_TOP/patch/115/sql/hrhksmpl.pkb

Features of the Create Batch Users Process

The create batch users process only creates new responsibilities or profile option values for the new responsibility you create in the batch. This is for Oracle HRMS Applications only. The batch process does not create security profiles either. However, if you create a security profile, in Oracle HRMS, you can assign the security profile to a new responsibility that is created for a user in the batch process. The batch process does not create security attributes for a responsibility or a user.

A naming convention you might use is email ID with a responsibility name. For example, email ID JSMITH associated with the Manager Self Service responsibility could be JSMITH_MSS. If you have set up security profiles for managers in Oracle HRMS you can associate the security profile name to a user, a responsibility and a security profile. For example, the SEC_PF security profile could be JSMITH_MSS_SEC_PF.

You can create a template responsibility for the batch process. If you create a template responsibility, or use the predefined Manager Self Service responsibility, you can code a new responsibility created by the
user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibilities attributes, by setting values in the communication area, hr_user_acct_utility, of the API.
Creating Batch User Accounts with Concurrent Programs

To create batches of users you must first write user hooks with your own custom logic.


When you have created user hooks, you can run a set of concurrent programs to manage the batch creation of users on an ongoing basis.

You run the concurrent programs from the Submit Requests window.

To create batch user accounts with concurrent programs:

1. Run the User Account Employee Extract Process
   This program extracts employee records and creates a batch file of user accounts to be created or deactivated.
   See: User Account Employee Extract Process

2. Run Data Pump Engine
   This program uses the batch from the employee extract process and calls the HR API to create or deactivate user accounts.
   See: Data Pump Engine

3. Submit Data Pump Batch Exceptions Report
   This program reports errors in the Data Pump Engine.
   See: Data Pump Batch Exceptions Report

User Account Employee Extract Process

This extract process produces output records which are used by the Data Pump Engine. The Data Pump Engine calls the hr_user_acct_api to create or deactivate user accounts.

The batch name is written to the HR_PUMP_BATCH_HEADERS table. The extracted employee records are written to the HR_PUMP_BATCH_LINES table. The batch line table has defined generic attributes but for each API, the Data Pump generates a view on the HR_PUMP_BATCH_LINES table to reflect the parameters of the API.

The specific views tailored for the hr_user_acct_api are:

- hrdpv_create_user_acct

Records for creating new user accounts can be mapped to this database view.
• hrdpv_update_user_acct

Records for terminated employees whose user accounts are to be inactivated can be mapped to this database view

**Note:** You must use a meaningful batch name. For example, run type and date range or another parameter. The batch name is the only way you can identify which batch to select in the Employee Data Pump process and the Data Pump Batch Exceptions Report processes.

▶ **To run the user account employee extract process:**

1. Access the User Account Employee Extract Process concurrent program.
2. Enter a batch name to identify the batch.
3. Enter the following date input parameters:
   • Start Date
defaults to SYSDATE. This parameter sets the start date from which employee records are extracted
   • End Date
defaults to SYSDATE. This parameter is used in conjunction with the start date parameter to set a date range for the extraction of employee records
4. Enter the following organization input parameters:
   • Organization
this parameter comprises a list of all the business group organizations that the responsibility is associated with. If you select an organization from the list of values, the program only extracts records from the selected organization.

   **Note:** If you enter values in the Organization parameter, they are superceded by any values you enter in the Organization Hierarchy, Organization Hierarchy Version, and Parent Organization parameters. These parameters always take precedence and replace the values entered in the organization parameter and work together as a set.

   • Organization Hierarchy
organization hierarchy name for the responsibility’s business group. This parameter contains an list of all the organizations hierarchies in the business group.

   • Organization Hierarchy Version
organization hierarchy version for the responsibility’s business group. This parameter contains an list of the organization hierarchy versions selected in the organization hierarchy parameter.

- Parent Organization

  parent organization within the hierarchy. Selecting the parent organization will extract records from this organization and any organizations below the parent organization.

See: Concurrent Programs, *(Oracle Application’s System Administration Guide)*

5. Enter the Run Type input parameters by selecting a processing option from the list of values. The processing options are:

- Create User Account for New Hires
  
  selects all employees hired between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.

- Create User Accounts for All Employees
  
  selects all employees as of the end date, within the organization or organization hierarchy. The start date parameter will be ignored and employees terminated before the end date will not be selected either. This run type is used on the initial implementation and is usually used once.

- Inactivate User Account for Terminated Employees
  
  selects all employees terminated between the start date and end date parameter within the organization or organization hierarchy. Once selected, the terminated employee’s user account is end dated. This run type is used on an ongoing basis to end date terminated employee accounts within the date range.

- Create and Inactivate User Accounts
  
  runs two queries. The first query selects all employees hired between the start date and end date within the organization or organization hierarchy. The second query selects all employees terminated between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.
Note: Each employee extracted from the database is recorded in the hr_pump_batch_line table. The hrdpv_create_user_acct view has been defined to map create user accounts to the hr_pump_batch_line table. The hrdpv_update_user_acct view has been defined to map inactivate user accounts to the hr_pump_batch_line table. You can access these views because the API column name is used to identify the record rather than the generic names used in the hr_pump_batch_lines table.

Data Pump Engine

The Data Pump Engine will call the hr_user_acct_api to perform data validation and loading operations. The employee data is recorded in the hr_pump_batch_lines table.

Note: You must run the User Account Employee Extract Process before you run the Data Pump Engine process. The Data Pump Engine depends on the batch id the User Account Employee Extract process creates.

To run the Data Pump Engine concurrent program:
1. Access the Data Pump Engine concurrent program.
2. Enter the following parameters:
   • Batch Name
     you must enter the same batch name as you did in the Employee Extract Process. The Batch Name is the only information you have to identify which batch to run
   • Validation Mode
     you can set two values, YES or NO. A YES value enables you to review errors in the batch, or related records in a batch, and change them before any are committed to the database.
     A NO value will commit the data to the database if there are no errors. If there are errors the data will not be committed to the database and you can fix the errors and rerun the batch.
Data Pump will set the Line Status to one of the following values:

- E – Error
- C – Completed
- U – Unprocessed
- V – Valid

See: Concurrent Programs, *(Oracle Application’s System Administration Guide)*

See: Oracle HRMS Data Pump, *Oracle HRMS Data Pump (Implementing Oracle HRMS)*

**Employee Data Pump Exceptions Report**

Each employee record is recorded in an individual batch line. The data pump exceptions report will show whether the error is from the batch header or batch line. You can identify which person record is in error from the person id in the exception report.


**To run the Data Pump Batch Exceptions report:**


*Note:* You can run the Data Pump Engine and Data Pump Batch Exception Report processes in sequence. See: Running Concurrent Processes, *(System Administrator’s Guide)*

See: Oracle HRMS Data Pump, *Oracle HRMS Data Pump (Implementing Oracle HRMS)*
Before you write your user hook, you must review your employee population and create a standard user name format, responsibility, and security profile for your enterprise. When you have defined a standard and created any security profiles or security groups you need, you can begin to write your user hook.

You can create a template responsibility for the batch process. If you create a template responsibility or use the predefined Manager Self-Service responsibility, you can code a new responsibility created by the user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibility's attributes by setting values in the communication area of the API, hr_user_acct_utility.

You can find sample user hook code in the following package:

- $PER_TOP/patch/115/sql/hrhksmpl.pkb

**To set up the prerequisites for writing user hooks:**

1. Create a security profile in Oracle HRMS and, using your naming standard, associate the security profile and responsibility to a new user in your user hook code.

2. Implement security groups to manage security profiles with the Enable Security Groups profile option. By implementing security groups, you can associate more than one security profile to a single responsibility.

   **Note:** Before you write user hooks, run the Security List Maintenance concurrent process. This ensures that the security profiles work.

   **Note:** If you plan to use security groups in a responsibility defined for use in Oracle Self-Service Web Applications, or plan to create a new responsibility for use in Oracle Self-Service Web Applications, set the Enable Security Groups profile option at the application level: Oracle Self Service Web Applications.

3. Set up a guest user account in Oracle Applications by setting the GUEST USER PASSWORD profile option. This must be in the format <username/password>. You can obtain and verify the guest user account with your Database Administrator.

4. Use the Define System Profile Option Value in System Administrator responsibility to set a security profile at Site or Application level. This is necessary because security profile option values can be set at Responsibility or User level with the batch process.
Note: The sample user hook is called hrhksmpl.pkb and each code block is documented. You can also find a copy of the sample in the following directory $PER_TOP/patch/115/sql.

See: API User Hooks, *APIs in Oracle HRMS (Implementing Oracle HRMS)*

See: Sample Code, *Oracle HRMS Data Pump (Implementing Oracle HRMS)*

### Tables Updated in the Batch Process

The batch process inserts records into the following FND tables:

- **FND_USER**
- **FND_USER_RESP_GROUPS**
  
  to enable a new user to use a designated responsibility
- **FND_RESPONSIBILITY**
  
  if new responsibilities are created in the custom user hook module for the new user
- **FND_RESPONSIBILITY_TL**
  
  stores the translated value of responsibility name
- **FND_RESP_FUNCTIONS**
  
  if the new responsibility has function exclusion rules
- **FND_PROFILE_OPTION_VALUES**
  
  to set profile option values for any newly created responsibility for the user.
- **PER_SEC_PROFILE_ASSIGNMENTS**
  
  if security groups are enabled.

The batch process automates the functionality of the Define User Form and inserts records into the following FND tables:

- **FND_USER**
- **FND_RESP_GROUPS**

  Note: Security attributes for a user cannot be created in the batch process

The batch process automates the functionality of the Define Responsibility Form and inserts records into the following FND tables:

- **FND_USER_RESP_GROUPS**
Managing User Access

• FND_RESPONSIBILITY_TL

Note: Security attributes for a responsibility cannot be created in the batch process

The batch process automates the functionality of the Profile Option Value Form and inserts records into the following FND table:

• FND_PROFILE_OPTION_VALUES

➤ To write batch user hooks with your own custom business logic:

1. To create batches of users you need to write PL/SQL programs in the user hooks of the following API:
   • hr_user_acct_api

   This API contains two procedures:
   • hr_user_acct_api.create_user_acct
     used to create a new user
   • hr_user_acct_api.update_user_acct
     used to inactivate user accounts, for example on termination of an employee

To set up the Create User API procedure:

1. Write a PL/SQL program to communicate to the API the user name, password, responsibility, and profile to use when it creates a new user account for the employee in the process.

   There are two user hook points in the create user procedure:
   • hr_user_acct_bk1.create_user_acct_b
     before-process hook point
   • hr_user_acct_bk1.create_user_acct_a
     after-process hook point

   Use the before-process hook for the PL/SQL program. The program enters these values into the global variables or record structures in hr_user_acct_utility.

   Note: You can supply passwords for the new user account or leave the API to generate a random string. The string will be in an 8 character alphanumeric format.

2. Write a PL/SQL program for the after-process hook if you leave the API to generate a password. The program must save the password of the new user account to a file that can be accessed by a
system administrator. This is necessary because the password created by the API is encrypted when it is saved to the FND_USER table in the database. You must capture the password before it is encrypted so that you can notify employees of their initial password.

**Note:** If you supply a password, you may not need to write a user hook for this after-process hook point.

**To set up the Update User API procedure:**

The update user API procedure is used to inactivate employees. The API end dates the employees record in the FND_USER and FND_USER_RESP_GROUPS tables and is not meant for general purpose update.

There are two user hook points in the update user procedure:

- hr_user_acct_bk2.update_user_acct_b
  before process hook point
- hr_user_acct_bk2.update_user_acct_a
  after process hook point

The before process user hook point is used for your extra validation. The API will not pick up any values from your user hook.

The after process user hook point executes any extra logic after the main API validation and processing logic has successfully completed and the update process is finished.

**To carry out the remaining steps:**

1. Compile the custom package you have created after you have written your user hooks.

2. Register and link your custom package procedures to the appropriate API user hooks when you have compiled the package.

   See: API User Hooks *(Implementing Oracle HRMS)*

   A sample script to register and link your custom package and procedures is provided below.

**Sample code**

```sql
DECLARE
  ln_api_hook_call_id NUMBER;
  ln_object_version_number NUMBER;
  ln_api_hook_id NUMBER;
```

---

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BEGIN

-- get api_hook_id for the seeded before process user hook package procedure
SELECT ahk.api_hook_id
INTO ln_api_hook_id
FROM hr_api_hooks ahk,
hr_api_modules ahm
WHERE ahm.module_name = 'CREATE_USER_ACCT'
AND ahm.api_module_type = 'BP'
AND ahk.hook_package = 'HR_USER_ACCT_BK1'
AND ahk.hook_procedure = 'CREATE_USER_ACCT_B'
AND ahk.api_hook_type = 'BP'
AND ahk.api_module_id = ahm.api_module_id;

-- insert a row into HR_API_HOOK_CALLS for before process user hook custom package procedure
hr_api_hook_call_api.create_api_hook_call(
  p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),
  p_api_hook_id => ln_api_hook_id,
  p_api_hook_call_type => 'PP',
  p_sequence => 1,
  p_enabled_flag => 'Y',
  p_call_package => 'MY_USER_ACCT', -- your custom package name
  p_call_procedure => 'CREATE_USER_ACCT_B', -- your custom package procedure name
  p_api_hook_call_id => ln_api_hook_call_id,
  p_object_version_number => ln_object_version_number
);

-- get api_hook_id for the seeded after process user hook package procedure
SELECT ahk.api_hook_id
INTO ln_api_hook_id
FROM hr_api_hooks ahk,
hr_api_modules ahm
WHERE ahm.module_name = 'CREATE_USER_ACCT'
AND ahm.api_module_type = 'BP'
AND ahk.hook_package = 'HR_USER_ACCT_BK1'
AND ahk.hook_procedure = 'CREATE_USER_ACCT_A'
AND ahk.api_hook_type = 'AP'
AND ahk.api_module_id = ahm.api_module_id;

-- insert a row in HR_API_HOOK_CALLS for after process user hook custom package procedure
hr_api_hook_call_api.create_api_hook_call(
    p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),
    p_api_hook_id   => ln_api_hook_id,
    p_api_hook_call_type => 'PP',
    p_sequence   => 1,
    p_enabled_flag => 'Y',
    p_call_package => 'MY_USER_ACCT',
    p_call_procedure => 'CREATE_USER_ACCT_A',
    p_api_hook_call_id => ln_api_hook_call_id,
    p_object_version_number => ln_object_version_number
);

EXCEPTION
when others then
  dbms_output.put_line('Error in seeding user hook procedures: ' || sqlerrm);
END;
/
commit;
exit;

Execute User Hook Pre-Processor

When you have registered and linked your custom package procedure to the API you should execute the user hook pre-processor program. Run the hrahkone.sql found in $PER_TOP/patch/115/sql directory to do this. However, you’ll need to know the internal api_module_id for the HR_USER_ACCT_API before running the script. To find the internal api_module_id you should run the script below:

```
SELECT api_module_id,
      api_module_type,
      module_name
FROM hr_api_modules
WHERE module_package = 'HR_USER_ACCT_API';
```

You should see results similar to those below:

<table>
<thead>
<tr>
<th>API_MODULE_ID</th>
<th>API_MODULE_TYPE</th>
<th>MODULE_NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>383</td>
<td>BP</td>
<td>CREATE_USER_ACCT</td>
</tr>
<tr>
<td>384</td>
<td>BP</td>
<td>UPDATE_USER_ACCT</td>
</tr>
</tbody>
</table>

**Note:** Your api_module_id will be different from the one above.

Use your own API module id when executing hrahkone.sql. If you have a customer package for UPDATE_USER_ACCT hook point, you will need to run hrahkone.sql twice. Once for the api_module_id for CREATE_USER_ACCT hook call and second for the UPDATE_USER_ACCT hook call.
3. Enter any new message text for the messages that you issue in your custom package when you have run the pre-processor program. Use an Application Developer responsibility in Oracle Applications to create your message text.

4. Ensure you have set the application level correctly if you use security groups to manage security profiles. For example, in SSHR you must set the application level to Oracle Self Service Web Applications. Set the security profile option to the application level if you need to associate the responsibility with another HRMS application.

   This updates the following tables: per_sec_profile_assignments, and fnd_userRespGroups

5. Make sure that the Enable Security Groups profile option is Yes.

6. Set the Data Pump error parameters. These parameter control aspects of the Data Pump Engine process.

   See: Oracle HRMS Data Pump (Implementing Oracle HRMS).

   Note: You must set the MAX_ERRORS_ALLOWED parameter to see all the errors logged during the run. This parameter controls how many errors are issued before the engine stops processing. The default value for the parameter is 20 or the chunk size. If you do not set this parameter value, the engine will stop processing after 20 errors.

7. Test the custom packages by running the following programs: To test, run the User Account Employee Extract concurrent program to create batches of extracted employees. Run the Data Pump Engine concurrent program to process your batch, and run the Data Pump Batch Exceptions concurrent program to report any errors.

   • User Account Employee Extract concurrent program – to create batches of extracted employees
   • Data Pump Engine concurrent program – to process your batch
   • Data Pump Batch Exceptions concurrent program – to report any errors.

   If necessary, you can rerun the batch after fixing any errors.

   Note: You can use the Pipemon utility to help you debug your code.

   See: Creating Batches of Users with Concurrent Programs: page 5 – 20
CHAPTER 6

Configuring Process Flows
Self–Service Workflows

Oracle Self–Service Web Applications utilize the capabilities of Oracle Workflow to manage transaction flows. The Workflows are embedded within SSHR and control the flow of information between the HR professional, the manager, the employee, and the applicant.

See: Oracle Workflow Guide (available on Metalink)

SSHR uses workflow processes to combine related functions into a single transaction (for example, to add Special Information Types to Change Assignment or to Personal Information), and to control the transaction flow between the initiating user and other users such as a manager, an HR professional, or an applicant.

You use the Workflow Builder to look at the delivered processes which have been designed to support typical business processes. If necessary, you can configure different versions of the workflow processes to suit your business processes. You link a workflow process to one or more functions using the Form Functions window. When you have linked the workflow process to the function, you can include or hide the function in your user menus.

See: Defining Functions for SSHR: page 5–15

This chapter describes how to use the Workflow Builder to review the delivered process flows and to configure alternative flows if desired.

Approvals Processes

You also use the Workflow Builder to configure your approvals processes. For more information, see: Approvals: page 8–2
Workflow Objects and Item Types

In Oracle Workflow, all processes are associated with an item type. An item type can include one or more processes and related objects, such as item attributes, functions, and messages. Oracle SSHR delivers a number of predefined workflow item types containing workflow processes that you can work with.

- HRMS Self-Service (HRSSA)
- HR Offer Letter (HR_OFFER) (for SSHR 3.4 only)
- HR Standard (HRSTAND) (for SSHR 3.4 only)

Previous versions of this implementation guide advised customers to make their configuration change to a copy of the delivered item type. Workflow processes that have been implemented using this approach will still be supported, however, for new configurations, you should make your changes to the delivered item type using the approach described below. The new approach utilizes Oracle Workflow’s access level features for preserving customizations.

You update the workflow item type in the Workflow Builder.

**Note:** We recommend that you do not change the item type directly in the database. Instead, download the item type to a .wft file which you then source control. Make the changes to this file and then upload it to the server.

See: Opening and Saving Item Types (Oracle Workflow Guide Release 2.6.1)

Workflow Access Levels:

The access protection levels ensure that your customizations are preserved during an upgrade. As long as you set your own access level to 100 or (higher) while working on changes, the access protection ensures that when an upgrade takes place, the “read-only” objects are updated and that customizations made to the “customizable” objects are preserved.

You can change objects if your access level is less than or equal to the object’s protection level and greater than or equal to the object’s customization level.

**Note:** If you copy workflow objects and change the access level to 100, the copied objects are displayed without a red tag on the icon. The original objects have a red tag. The absence of the red tag indicates that you can customize the objects.

The following table shows typical settings for workflow objects within the HRSSA item type. The customization level of a customizable object
is set to the user’s access level at the time when the user customized the object.

<table>
<thead>
<tr>
<th></th>
<th>Most Objects (Default)</th>
<th>Customizable Objects (as delivered)</th>
<th>Customizable Objects (after changes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protection level</td>
<td>20</td>
<td>1000</td>
<td>1000</td>
</tr>
<tr>
<td>Lock at this level</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Customization level</td>
<td>20</td>
<td>20</td>
<td>100</td>
</tr>
<tr>
<td>Preserve customizations</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

See: Overview of Workflow Access Protection (*Oracle Applications Workflow Guide*)
Configuring Workflow Objects

Before you make changes to workflow objects:

2. On the File Menu select Help/About Workflow Builder.
3. Ensure that you are using a version of Workflow Builder that is compatible with the version of Oracle Workflow installed on your server.
4. Set the Access Level to 100.
   See: Workflow Objects and Item Types: page 6–3
5. Deselect the Allow Modifications of Customized Objects check box.
6. Select and display the Human Resources Self-Service Applications item type. Save it to a local file for backup.
   
   Note: We recommend that you maintain source control for the .wft files so that you can track changes to the original objects, move definitions to other database instances using the Workflow Loader, and revert to previous versions if necessary.

To modify delivered workflow objects:

2. Select and display the Human Resources Self-Service Applications item type.
3. If required, change any configurable item attributes.
   
   Note: Some item attributes can be customized and other objects, such as processes, notifications, messages, and lookup types, are “read-only”. You can change the “customizable” attributes directly in the workflow process. In SSHR item types, the only directly configurable objects are item-level attributes (including enterprise e-mail addresses) and dynamic approval levels.
   
   See: Defining Your Enterprise’s Email Addresses: page 6–9
   
   See: Configuring Approvals with the Workflow Builder: page 8–7
4. If required, create copies of the read-only objects.
   
   See: Copying Workflow Processes
5. Save your work.
Copying Workflow Processes

1. To copy a workflow process:
   1. Copy the object and rename it.
      
      **Note:** Prefix your copies with a consistent code, for example, a consistent numeral or a four-letter acronym for the company.
   2. You may have to copy multiple levels of the process, for example, to make changes to the Basic Details subprocess within the Personal Information process, you would have to copy the overall process (Personal Information) and the subprocesses (Process Basic Details and Process Personal Information).
   3. If you have copied (and modified) a subprocess, you will have to insert your copy of the subprocess into your copy of the higher level process in place of the original subprocess.
   4. Save your work.
   5. Create at least one function to point to the new process.
      
      See: Defining Functions for SSHR: page 5 – 15

2. After applying a patch:

   During the application of an SSHR patch, the workflow loader utility ensures that your server has the latest versions of any delivered workflow objects. This upload overwrites any “read-only” objects but preserves any customizations that have been made to “customizable” objects.

   If a patch includes new features or bug fixes for delivered objects that you have copied, you need to apply the same changes to your copied objects. Refer to the patch readme file for instructions. You may have to compare your copied object with the original read-only object.
Configuring Workflow Attribute Values

Workflow attribute values are the values for item types. They are variables that can be set by the application that maintains the item.

You configure workflow attributes in the Workflow Builder.

If you want to modify a predefined process, first make a copy of the process.

See: Self-Service Workflows: page 6 ~ 2

To configure workflow attributes:

1. Open Workflow Builder.
2. If necessary, create a copy of the workflow process you want to modify.
3. Open the Human Resources Self-Service Applications Item Type.
   See: Workflow Objects and Item Types: page 6 ~ 3
4. Double-click the process you want to modify. This opens the Process window.
5. Double-click an activity in the Process window to open the Control Properties window.
6. Choose the Node Attributes Tab and select a value name. For information on the attributes that are relevant for each process, see the function-specific documentation.
7. Edit any values defined in a procedure in the Value drop down list.
8. Click OK and save your work.
Configuring Workflow Error Processes

Every workflow-enabled function has an error process. The process runs when a system error occurs. The process sends a notification and a description to the System Administrator’s ID.

► To configure a workflow error process:

1. Edit the workflow error process:
   • HR_STANDARD_ERROR_PRC
2. Change the text of the error message by editing the Self-Service HR System Error Message:
   • HR_SYSTEM_ERROR_MSG
3. Save your work.
Defining Your Enterprise’s Email Addresses

Email addresses of key people in your enterprise may be displayed on various pages or error messages throughout SSHR.

You set up the email addresses for your enterprise in the Workflow Builder.

► To change email addresses:

1. Open the Oracle Workflow Builder.
2. Open your configured HRMS Self Service Application item type (HRSSA).
3. Select Attributes.
4. Select the following attribute and enter the appropriate email address in the Default Value field:
   - HR Department E-mail ID

   Note: You configure the Training Administrator ID (if using Enroll in a Class or Cancel Enrollment) and the Recruitment Supervisor ID (if using Candidate Offers) in the Professional Forms Interface.
5. Save your work.
Configuring Page Layouts
The Configuration Framework

The Configuration Framework, a component of the Oracle Applications (OA) Framework technology, enables you to modify many aspects of the appearance and behavior of self-service web pages which are defined in an active data dictionary: the Web Applications Dictionary. The Configuration Framework is a subset of the Web Applications Dictionary functionality and provides a user-friendly interface for making changes to the Web Applications Dictionary definitions where permitted.

See: OA Configuration Framework (available on Metalink)

See: Web Applications Dictionary (Oracle Self-Service Web Applications Implementation Manual)

Configuration Framework Hierarchy

The Configuration Framework enables you to configure web pages at different levels: function, localization, site, organization, responsibility, portlet, and user. The lower level configurations, for example, user-level configurations, take precedence over the higher level configurations, for example, site-level configurations.

If you make configurations at the organization or site level, they will affect all users within the organization or site. For example, you may want to include a particular logo in a web page for all users within an organization.

To enable administration-level configurations (configurations at the localization, site, organization, function, and responsibility levels), the system administrator must set the configuration profile options for the user in question. The user then logs on to the self-service application and selects a responsibility. If the profile options have been set correctly, the user will see the Configuration button (may also be called Customization) on the web page. By clicking on this button, the user can customize the page to the level defined by the system administrator.

Typical administration-level configurations include:

- Creating views
- Changing column labels
- Hiding/Displaying columns
- Configuring tables
- Filtering and sorting data
The system administrator decides whether to enable the Configuration Framework at the different levels. For more information, see the OA Configuration Framework documentation which is available on Metalink.

Configurable Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Levels</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customize Self-Service Defn</td>
<td>Responsibility, User</td>
<td>Yes/No</td>
<td>No</td>
</tr>
<tr>
<td>Disable Self-Service Custom</td>
<td>Site, Application</td>
<td>Yes/No</td>
<td>No</td>
</tr>
</tbody>
</table>

Customize Self-Service Defn

This profile option enables or disables the global Configure (or Customize) URL link that appears on each self-service web application page for Admin-level customizations.

Disable Self-Service Custom

If this system profile option is set to Yes, the configurations you make will not be applied, regardless of the level at which you make the configurations. Only the original definition of each self-service page will be displayed.
Configuring Web Pages

It may sometimes be necessary to modify the predefined web page regions to suit your business requirements. You configure your web pages using the Configuration Framework or, if necessary, the Web Applications Dictionary.

See: OA Customization Framework (available on Metalink)
See: Web Applications Dictionary (available on Metalink)

1. Make sure that you are using a responsibility with administration-level customization access.

2. Navigate to the web page you want to configure.

3. Choose the global Customize button for the web page or the Personalize Region link for a specific region.

   **Note:** If you want to configure the page at site level, you do not need to enter a customization value. If you are configuring at the responsibility or functional level, you must specify which responsibility or function is affected.

   The Create View page is displayed.

4. Make your configuration changes.

5. If required, you can hide or display flexfield segments.

   See: Configuring Flexfields: page 7 – 5

6. Save your work.
Configuring Flexfields

Flexfields are user-defined data structures which are provided with many of the applications database tables. Key flexfields, for example, the Job Key flexfield are used to uniquely identify a record. Descriptive flexfields, for example, Additional Assignment Details add attributes to an existing object. Each flexfield can consist of multiple flexfield segments, each with its own validation rules.

See: Oracle Applications Flexfields (Oracle Applied Technology Guide)

All the segments that you define as Enabled and Displayed are visible to users of the Professional User interface, and by default are visible to SSHR users. However, you may choose to display only a subset of these segments in some SSHR web pages.

Note: Flexfield segments are not displayed in self-service applications until you perform these additional configuration steps.

You modify and add flexfields to regions of your web pages using the Configuration Framework.

To modify the flexfields displayed in a region:

1. Select the Region.
2. Configure the region by choosing the Personalize Region.
3. Leave the Flex Segment List field blank if you want to display all the segments in the flexfield. If you only want to display some of the segments, you must manually specify the segments in the Flex Segment List.

You enter the segments to be displayed as follows:

context1 | segment1 | segment | context2 | segment 1

For example,

Global Data Element | New Employer | Address | US | Zip Code

4. Choose Save.
Configuring Tabbed Regions

Tabbed regions appear on several SSHR web pages, for example, the Manager Actions page includes the Employees and Employee Actions tabs. The self-service Benefits functions also use tabbed regions.

The appearance of these tabbed regions is defined by a “hidden” submenu (See: Self-Service Menus and User Access). To change the appearance of the tabbed regions, you modify the prompts for the functions attached to the hidden submenu.

Note: If you want to modify the tab names, first create a copy of the delivered hidden submenu and modify the copy.

The following submenus contain tabbed regions:

- Employee Enter Process Menu (HR_EMP.ENTERPROCESS_MENU)
  Which contains the following tabbed region:
  - Personal Actions function
- Manager Enter Process Menu (HR_MGR.ENTERPROCESS_MENU)
  Which contains the following tabbed regions:
  - Employees (HR_EMPLOYEES_MENU)
    - Hierarchy
    - My List
    - Search
  - Manager Actions function
- HR Professional V4.0 Menu (HR_PROF_SELF_SERVICE_V4.0)
  Which contains the following tabbed regions:
  - HR Views (HR_VIEWS_MENU)
    - Search function
    - HR Views Submenu (HR_VIEWS)
      - Employee Information View
      - Assignment Information View
      - Compensation Activity View
      - Termination History View
  - Search function
- Benefits Self Service (BEN_SELF_SERVICE_Benefits)
  Which contains the following tabbed regions:
• Benefits Enrollments function
• Current Benefits function

See also: Setting Up Self–Service Benefits Web Pages: page 13 – 10

Some tabbed regions include a subset of buttons. For example, the Employees menu includes the Hierarchy, My List, and Search buttons. To remove buttons from display, you either create a new hidden submenu with the required functions (buttons) or you can exclude the functions (buttons) at responsibility level.

**Note:** If you create a copy of the predelivered submenus and modify the copy, you must replace the link to the predelivered submenu in the Web Applications Dictionary with a link to your custom submenu.

**To rename a tabbed region or button:**

You rename tabbed regions and buttons in the Menus window.

1. Query the submenu.
2. Create a copy of the delivered submenu.
3. Rename the tabbed regions for your copied menu by changing the prompts for the corresponding submenu or function.
4. Save your work.
5. Replace the link to the delivered hidden submenu in the Web Applications Dictionary.

See: To replace the delivered link to the hidden submenu: page 7 – 8

**To remove a tabbed region or button from display:**

You can use one of the following methods to remove a tabbed region or button from display:

**Set a function exclusion at the responsibility level:**

1. In the Responsibility window, query the self–service manager responsibility.
2. In the Menu Exclusions tabbed region, create an exclusion with the type Function.
3. Select the function you wish to exclude in the Name column.
4. Save your work.

**Create a new submenu with only the required functions (tabbed regions or buttons):**
**Caution:** If you hide the My List function, you should also hide the Search function, and vice versa.

1. In the Menu window, create a new menu.
2. Add to it the required functions, for example, the Tree View and Search functions.
3. Save your work.
4. Query your top–level menu.
5. Add your new submenu to your top–level menu as a hidden submenu.

**Note:** Make sure that you delete the Manager Enter Process submenu from your top–level menu.

See: Defining Menus for SSHR: page 5 – 12

6. Save your work.
7. Replace the link to the delivered submenu in the Web Applications Dictionary using the following procedure.

**To replace the delivered link to the hidden submenu**

You replace the link in the Region Items window of the Web Applications Dictionary.

1. Query the region that contains the tabbed regions.
2. Choose the Region Items button.
3. Find the region item with the attribute name Application Menu and scroll along until the Menu Name column is displayed.
4. Replace the delivered submenu with your custom submenu.
5. Save your work.
6. Restart the Apache listener.
Adding Instructions to Web Pages

You can change the predefined instructions, messages, and tips attached to your Web pages to provide additional information for your users. You can create the following texts:

- Instructions appear at the top of a region and generally give advice applicable to the whole region or page.
- Long messages are attached to a field. When the user clicks the Information next to a field, the message is displayed in a separate window.
- Short tips are also attached to a field, however, they are displayed underneath the field in blue.

You create texts in the Messages window and add them to your region in the Configuration Framework.

**Note:** You can only change a text for a region that already contains an instruction, message, or tip. You cannot add a message to a region that is delivered without a message.

**To create a new message text:**

1. Log on to the database using an Application Developer responsibility.
2. Navigate to the Messages window.
3. Enter the name for your message.
4. Select Note as the message type.
5. Enter the application and the message text.
6. Save your work.

**To add a text to a region:**

1. Log on to a self-service application using a responsibility that allows configuration.
   **Note:** To enable configuration, the Customize Self-Service profile option (FND_CUSTOM_OA_DEFINITION) must be set to Yes at the responsibility level.
2. Navigate to the self-service page for which you want to change the text.
3. Choose the Personalize Region button for the region.
4. Choose the Advanced Settings button.
5. In the Tip Message Name column for the corresponding region, search for your new instruction, message, or tip.

6. If you are adding an instruction, leave the Tip Type field blank. Otherwise, select either Long Message or Short Tip.

7. Save your work.
Configuring the Global Button Bar

The Global Button Bar comprises the following buttons by default:

- Return to Portal
- Log Off
- Select Preferences
- Email
- Self-Service Help

Selecting a button enables a user to access the button’s function.

You can configure the Global Button bar by removing any, or all, of the buttons from a user’s web page. You edit the contents of the Global Button bar in the Menus window. When you remove a button from display a user can no longer access the button’s functionality. You can also rearrange the order of the buttons or use a button bar that you create.

**To configure a button on the global button bar:**

1. Query the following Menu in the Menus window:
   - ICX_GLOBAL_MENU
2. Consider which of the following functions you want your users to access with the Global Button Bar:
   - Return to Portal
   - Log Off
   - Select Preferences
   - Email
   - Self-Service Help
3. Delete the functions you don’t want users to access.
4. Save your work.

   See: User’s Menu *(Oracle Applications System Administrator’s Guide)*

**To remove the global button bar display:**

1. Navigate to the web page you want to configure.
2. Choose Customize.
3. Hide the Global Button bar.

   See: OA Customization Framework (available on Metalink)
Replacing the Default Oracle Logo

You can replace the default Oracle logo, which appears in the upper left corner of the Web pages, with your own logo. You can do this in one of two ways, you can overwrite the default logo with a logo of the same name or you can replace the default logo with one of your own.

► To overwrite the default logo with your own logo:
   1. Create a logo.
   2. Save and name the logo:
      - FNDSSCORP.gif
   3. Place the gif in the $OA_MEDIA/<Language> directory.
      Note: If you have a multilingual install, you must also copy this file to the other language locations.

► To replace the default logo with your own logo:
   1. Create a .gif logo.
   2. Place the gif in the $OA_MEDIA/<Language> directory.
      Note: If you have a multilingual install, you must also copy this file to the other language locations.
   3. Query each of the Web Page Regions.
   4. Overwrite the Image File Name column entry with the name of your Logo.
   5. Save your work.

Approvals
Overview of Approvals

The Approvals process enables you to decide whether transactions carried out by SSHR users need approval before they are submitted to the HR tables. You can define different approval requirements for different transactions and vary the approval requirements by responsibility. For example, you can configure the workflow processes so that the Address part of Personal Information requires approval but the Phone Numbers part does not. Alternatively, you can vary the Approvals requirements by responsibility so that records changed by employees would need approval but records changed by managers would not.

If you enable Approvals for a transaction, the transaction enters the following approvals loop:

Figure 8–1 The Basic Approvals Loop

The PL/SQL code behind the approvals logic checks whether the current approver is the final approver. You define the number of approvers using the Approval Level attribute in the Workflow Builder.

If the current approver is not the final approver, the PL/SQL code fetches the user ID for the next approver who then receives an approvals notification.

The next approver can either reject the transaction, approve the transaction, or return the transaction for correction (see: Approvals with Correction V4.0).
You can configure approvals in one or more of the following ways to ensure that it meets the requirements of your enterprise. You can:

- Limit the number of approvals levels (configure in Workflow Builder)
- Stop the approvals at a specific grade level (configure using PL/SQL)
- Route the approval to a manager then to an administrator (configure in Workflow Builder and PL/SQL)
- Use the position hierarchy (configure in PL/SQL)

**Approvals with Correction V4.0**

Approvals with Corrections V4.0 is the standard approvals module for SSHR 4.0. It is an enhanced version of the SSHR 3.x Dynamic Approvals process.

The Approvals module enables users to add additional approvers and/or notification recipients to participate in the approval process of any Oracle SSHR transaction. You can also display the approvers and limit the number of approval levels.

The approvals functionality works in two parts. One part is the self-service user interface which enables the initiating manager to add additional approvers and/or notification recipients. The second part is the workflow approval process which generates the default approvers. The dynamic approval workflow process also sends notifications to approvers and/or notification recipients based on the data entered by the users.

To use the user interface functionality, the system administrator needs to enable dynamic approvals for the workflow process in question. To do this, the system administrator sets the activity attribute in the Review activity.

See: Configuring Approvals: page 8 – 7
See: Review and Confirm: page 9 – 14

**User Interface for Approvals**

The self-service user interface for dynamic approvals has two sections: the Approvals and Notification Recipient sections. The SSHR user can see the path of the transaction by displaying all default approvers who will participate in the approval process (the list of approvers is driven by the get_next_approver logic). The manager initiating the SSHR...
transaction can add additional approvers to the approval chain and nominate additional notification recipients. The notifications would then be sent to these persons on submission and/or on approval. The system administrator can disable the insert approvers/add notification recipients functionality if required.

**Workflow Approvals Process**

The workflow approvals process uses the user hook package, `hr_approval_custom`, to generate the default approvers.

In addition to enabling the dynamic approvals, the system administrator can also set the number of levels in the approvals hierarchy. You can set the approvals levels locally (for the specific workflow process) or at the workflow item level. If you set the levels at the item level, all processes within the item type have the same approval levels. Although the system allows you to set the number of levels at both process level and item level, the process level has priority over the item level.

**Menu and Function Names**

Not applicable

**Workflow**

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Approvals Process with Correction V4.0

**Configurable Workflow Attributes:**

Not applicable

**Configurable Definitions for Web Applications Dictionary:**

The following definitions can be configured in the Web Applications Dictionary:

**Regions**

**Dynamic Approvals Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_DYNAMIC_APPROVALS_TOP_SS</td>
<td>Dynamic Approval</td>
</tr>
<tr>
<td>HR_DYNAMIC_APPROVERS_LIST2_SS</td>
<td>Dynamic Approvers List2</td>
</tr>
</tbody>
</table>
Dynamic Approvals Notiﬁcations Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_DYNAMIC_NOTIFICATIONS_SS</td>
<td>Dynamic Notifications Header</td>
</tr>
<tr>
<td>HR_DYNAMIC_NOTIFIERS_LOV_SS</td>
<td>Notifications</td>
</tr>
<tr>
<td>HR_DYNAMIC_NOTIFY_CONTROLS</td>
<td>Dynamic Notification Controls</td>
</tr>
<tr>
<td>HR_DYNAMIC_NOTIFY_LIST_SS</td>
<td>Dynamic Notifications List</td>
</tr>
</tbody>
</table>

Dynamic Approvals Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_REVIEW_DYNAMIC_APPROVAL_SS</td>
<td>Dynamic Approval</td>
</tr>
</tbody>
</table>

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

See; Review and Confirm: page 9 – 14

Additional Conﬁguration Steps:

1. You can configure the approvals processes using the Workflow Builder.
See: Configuring Approvals with the Workflow Builder: page 8 – 7

2. You can modify the approvals logic in the HR_APPROVAL_CUSTOM package.

See: Customizing Approvals Using PL/SQL: page 8 – 8
Configuring Approvals in the Workflow Builder

If required, you can configure the predefined approvals processes in the Workflow Builder. You set up the approvals process using workflow attributes.

► To configure approvals in the Workflow Builder:

1. Open the workflow item type.

2. Navigate to the process you want to modify and double click to open the workflow diagram.

3. Open the Review Page V4.0 activity for your workflow process.
   
   **Note:** You may have to drill down through several subprocesses until you reach the correct Review Page V4.0 activity.

4. Make a copy of the process and any affected subprocesses. For example, if you are modifying the approvals for the Process Personal Information V4.0 process, you would have to copy the Process Personal Information V4.0 process, and the related subprocesses, for example, the Process Basic Details subprocess.
   
   See: Updating Workflow Objects: page 6 – 3

5. Select the Review Page V4.0 activity for your process/subprocess and set the Approval Required workflow attribute (HR_APPROVAL_REQ_FLAG) to YES. This activates approval for your process/subprocess.
   
   **Note:** The default value varies for different modules.
   
   See: Review and Confirm: page 9 – 14

6. Decide how a process should pass through the entire approval chain, in other words, how many levels of approval are required. Set the approval level using the Approval Level attribute (HR_DYNAMIC_APPROVAL_LEVEL). Add an approval level value to the Default Value field. A value of 1 for example will pass the approval one level up the supervisor chain.
   
   **Note:** The default number of level is 0, meaning that the number of levels is unlimited.

7. Save your work.
Customizing Approvals Using PL/SQL

If necessary, you can review the logic in the `check_final_approver` and `get_next_approver` functions and modify them as required. These functions are within the HR_APPROVAL_CUSTOM package.

Make sure that your returned values are of the correct data type.

The following code shows the logic for the approval functions. If required, you can customize the code to use different approvals routings or to stop at a different grade level.

```sql
-- Check_final_approver
function check_final_approver
(p_forward_to_person_id in per_people_f.person_id%type
 ,p_person_id            in per_people_f.person_id%type)
return varchar2 is

  -- cursor csr_pa(l_effective_date in date) is
  -- select paf.person_id
  -- from per_all_assignments_f paf
  -- start with paf.person_id = p_person_id
  -- and paf.primary_flag = 'Y'
  -- and l_effective_date
  -- between paf.effective_start_date
  -- and paf.effective_end_date
  -- connect by prior paf.supervisor_id = paf.person_id
  -- and paf.primary_flag = 'Y'
  -- and l_effective_date
  -- between paf.effective_start_date
  -- and paf.effective_end_date;

  -- l_person_id per_people_f.person_id%type := null;

  begin
    -- loop through each row. the rows are returned in an order which makes
    -- the last row selected the top most node of the chain.
    for csr in csr_pa(trunc(sysdate)) loop
      -- set the l_person_id variable to the row fetched
      l_person_id := csr.person_id;
    end loop;

    if p_forward_to_person_id = l_person_id then
      return('Y');
    else
      return('N');
    end if;
  exception
    when others then
      return('E');
  end;
```
end check_finalApprover;
()

- **Get_next_approver**

function get_next_approver
  (p_person_id in per_people_f.person_id%type)
return per_people_f.person_id%type is
--
cursor csr_pa(l_effective_date in date,
l_in_person_id   in per_people_f.person_id%type) is
select ppf.person_id
from per_all_assignments_f paf,
per_people_f ppf
where paf.person_id = l_in_person_id
and paf.primary_flag = 'Y'
and l_effective_date
between paf.effective_start_date
and paf.effective_end_date
and ppf.person_id = paf.supervisor_id
and ppf.current_employee_flag = 'Y'
and l_effective_date
between ppf.effective_start_date
and ppf.effective_end_date;
--
l_out_person_id per_people_f.person_id%type default null;
--
begin
  -- [CUSTOMIZE]
  -- open the candidate select cursor
  open csr_pa(trunc(sysdate), p_person_id);
  -- fetch the candidate details
  fetch csr_pa into l_out_person_id;
  if csr_pa%notfound then
    -- if the cursor does not return a row then we must set the out
    -- parameter to null
    l_out_person_id := null;
  end if;
  -- close the cursor
  close csr_pa;
  return(l_out_person_id);
end get_next_approver;
()
CHAPTER 9

Common SSHR Functions
Overview of Common SSHR Modules

This chapter contains information on how to configure modules that provide common, low-level functionality used in many of the higher-level functions described in later chapters.

The common modules are:

- Person Tree
- Actions Page
- Release Employee Information
- Review and Confirm
- New User Registration
Person Tree

The Person Tree, or hierarchy, is the starting point for all manager self-service functions. It enables managers to select an employee record for processing in SSHR.

The Person Tree page consists of the following nested components which are explained in detail below:

- Employees region
  - Hierarchy nested region
  - My List nested region
  - Search nested region
- Employee Actions region

The format of the Person Tree page depends on the navigation path that the manager has taken. There are two possible paths:

- From the generic Manager Actions V4.0 menu
  
  In this case, the manager first selects the person from the person tree and then selects the SSHR module. The modules, or actions, for the selected person are displayed in a context-sensitive list.

  You set the parameter pDestination to HR_ACTIONS_SS (instead of setting it to a specific function) to ensure that the page includes all actions.

- From a specific manager self-service menu item
  
  In this case, the manager selects a specific module and then selects the person for processing. When the manager selects a person from the Person Tree, they are taken directly to the module specified by the function name passed in the pCalledFrom parameter for the manager function.

  See: Navigation Paths: page 5–5

  See: Defining Functions for SSHR: page 5–15

The Person Tree page consists of several tabbed regions which are defined by the Manager Enter Process hidden submenu (HR_MGR_ENTERPROCESS_MENU). The submenu currently contains the following tabbed regions:

- Employees
- Employee Actions

  Note: You must attach the Manager Enter Process submenu to the top-level menus for all manager responsibilities.

  See: Menus for Managers: page 5–11
Employees Tab

You define which regions appear on the Employees tab by modifying the Employees Menu hidden submenu (HR_EMPLOYEES_MENU). The Employees tab currently includes the following regions:

- Person Tree, or hierarchy
- My List
- Person Search

Note: You must attach the Employees Menu hidden submenu to the top-level menus for all manager responsibilities.

If required, you can hide the My List and Search tabs from responsibilities using function exclusions.

See: Menus for Managers: page 5 – 11

Employee Actions Tab

The Employee Actions tab is displayed when a manager either chooses the Manager Actions V4.0 function and selects a person or chooses a function and then selects a person. The contents of the Employee Actions tab is defined by the navigation path taken by the user.

If a manager has displayed the Person Tree before choosing a specific function (by choosing the Manager Actions V4.0 function), the Employee Actions tab displays a context-sensitive list of the functions available for the selected employee. The list is driven by the hidden submenu defined for the HR:Manager Actions Menu profile option. The default menu for this profile option is the predefined Personal Actions Menu (HR_LINE_MANAGER_PERS_FUNCTIONS).

If a manager does not select a person in the Person Tree, the selection defaults to the manager’s own employee record. In this case, the list displayed is driven by the hidden submenu for the HR:Personal Actions Menu profile option. The default menu for this profile option is the predefined Manager Actions Menu (HR_LINE_MANAGER_FUNCTIONS).

The list of functions displayed in the Employee Actions tab is also defined by the person’s legislation code.

See: Data Security Menus: page 5 – 10

If the manager selects a specific function first and then selects a person from the Person Tree, the Employee Actions tab only displays the preselected function. If the functions is not available, for example, if legislation restrictions apply, an error message is displayed.

See: Actions Page: page 9 – 8
### Menu and Function Names

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Manager Actions Tree View V4.0 and all manager functions</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

### Workflow

Not applicable

### Configurable Web Applications Dictionary Regions:

The following definitions can be configured using the Configuration Framework:

#### Regions

**Person Tree**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSON_TREE_TOP_SS</td>
<td>Hierarchy</td>
</tr>
<tr>
<td>HR_PERSON_TREE_CONTAINER_SS</td>
<td>Person Tree Container</td>
</tr>
<tr>
<td>HR_PERSON_TREE_POPLIST_SS</td>
<td>Views Tree Poplist</td>
</tr>
<tr>
<td>HR_PERSON_TREE_SS</td>
<td>Person Tree</td>
</tr>
</tbody>
</table>

**My List**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_MY_LIST_TOP_SS</td>
<td>My List</td>
</tr>
<tr>
<td>HR_MY_LIST_HEADER_SS</td>
<td>Enter Person My List Header</td>
</tr>
<tr>
<td>HR_MY_LIST_RESULTS_SS</td>
<td>Enter Person My List Results</td>
</tr>
</tbody>
</table>

**People Search Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSON_SEARCH_CONTAINER_SS</td>
<td>Person Search Container</td>
</tr>
<tr>
<td>HR_SEARCH_CRITERIA_BAS_SS</td>
<td>Basic Person Search Criteria</td>
</tr>
</tbody>
</table>
### Implementing Oracle Self-Service Human Resources 4.0

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_SEARCH_CRITERIA_ADV_SS</td>
<td>Advanced Search Criteria</td>
</tr>
<tr>
<td>HR_PERSON_LIST_SS</td>
<td>Person List</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

#### Tips and Instructions

### Hierarchy Page

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSON_TREE_CONTAINER_SS</td>
<td>Person Tree Container</td>
<td>HR Instruction</td>
<td>HR_INST_HIERARCHY_TREE</td>
<td></td>
</tr>
</tbody>
</table>

### My List

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_MY_LIST_HEADER_SS</td>
<td>Enter Person My List Header</td>
<td>HRInstruction</td>
<td>HR_INST_MY_LIST</td>
<td></td>
</tr>
<tr>
<td>HR_MY_LIST_HEADER_SS</td>
<td>Enter Person My List Header</td>
<td>HRInstruction1</td>
<td>HR_INST_MY_LIST_SEARCH</td>
<td></td>
</tr>
</tbody>
</table>

### Search Page

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSON_SEARCH_SWITCH_SS</td>
<td>Person Search Switch</td>
<td>HRInstruction</td>
<td>HR_INST_PERSON_SEARCH</td>
<td></td>
</tr>
<tr>
<td>HR_PERSON_SEARCH_SWITCH_SS</td>
<td>Person Search Switch</td>
<td>HRInstruction</td>
<td>HR_INST_PERSON_SEARCH_BASIC</td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
FlexFields:

Not applicable

Configurable Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Levels</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR:Cross Business Group</td>
<td>All</td>
<td>Yes/No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

See: User Profiles (*Oracle HRMS Applications User Guide*)

Additional Configuration Steps

My List Page

1. To configure the range of dates that users can see, change the values of the lookup type HR_HIRE_DATE.
   
   See: Adding Lookup Types and Values (*Customizing, Reporting, and System Administration in Oracle HRMS*)

Search Page

1. To prevent your users from using the Basic or Advanced Search, hide the corresponding region in the Configuration Framework.

2. You can configure the search criteria for the Basic and Advanced Searches. You can rearrange the sequence of the criteria and, if necessary, delete search criteria.
   
   See: Configuring Web Pages: page 7 – 4
**Actions Page**

The Actions page displays a context-sensitive list of actions that can be performed for a selected person and suspended actions. Suspended actions can include actions that a user has saved for later submission or actions that have been returned to the initiator by an approver, for example, to be corrected.

See: Navigation Paths: page 5 – 5

The Actions page can be accessed in one of the following ways:

- Managers can select an employee using one of the employee selection methods and then choose the Actions tab to display the actions relevant to the employee
- Managers can select the Actions tab from the Hierarchy page and display their own personal actions
- Employees can select the Personal Actions menu option from the Employee menu and display their personal actions

**Menu and Function Names**

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Manager Actions V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Actions V4.0</td>
</tr>
<tr>
<td>Manager Self Service V4.0</td>
<td>Suspended Actions Mgr V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Suspended Actions V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

**Workflow**

Not applicable

**Configurable Web Applications Dictionary Regions:**

The following definitions can be configured in the Configuration Framework:
Regions

Personal Actions Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSONAL_PROCESS_TOP_SS</td>
<td>Personal Process</td>
</tr>
<tr>
<td>HR_PROCESS_PEOPLE_SS</td>
<td>SSHR Process People</td>
</tr>
</tbody>
</table>

Manager Actions Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PROCESS_PEOPLE_TOP_SS</td>
<td>SSHR Process People</td>
</tr>
<tr>
<td>HR_PROCESS_PEOPLE_SS</td>
<td>Review Region</td>
</tr>
</tbody>
</table>

Actions Saved for Later Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PROCESS_MY_SUSPENDS_TOP_SS</td>
<td>SSHR Process My Suspended Actions</td>
</tr>
<tr>
<td>HR_PROCESS_MY_SUS_EDA_TOP_SS</td>
<td>SSHR Process My Suspended Actions EDA</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PROCESS_PEOPLE_SS</td>
<td>SSHR Process People</td>
<td>HR Instruction</td>
<td>HR_INST_ACTIONS</td>
<td></td>
</tr>
<tr>
<td>HR_PROCESS_SEL_ACT_SS</td>
<td>SSHR Process Selected Action Region</td>
<td>HR Instruction</td>
<td>HR_INST_ACTIONS_SINGLE</td>
<td></td>
</tr>
<tr>
<td>HR_PROCESS_LIST_SS</td>
<td>SSHR Process List</td>
<td>HR Instruction</td>
<td>HR_INST_ACTIONS_DUAL</td>
<td></td>
</tr>
<tr>
<td>HR_PROCESS_LIST_SS</td>
<td>SSHR Process List</td>
<td>HR Instruction2</td>
<td>HR_INST_ACTIONS_SHOW</td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
FlexFields:

Not applicable

Configurable Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Levels</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR:Manager Actions Menu</td>
<td>All</td>
<td>All Manager Actions menus</td>
<td>Manager Actions Menu</td>
</tr>
<tr>
<td>HR:Personal Actions Menu</td>
<td>All</td>
<td>All Personal Actions menus</td>
<td>Personal Actions Menu</td>
</tr>
<tr>
<td>HR: Actions – Validation</td>
<td>All</td>
<td>All Actions Checked, Pre-selected Action Checked, All Validation Post Selection</td>
<td>All Actions Checked</td>
</tr>
</tbody>
</table>

See: User Profiles *(Oracle HRMS Applications User Guide)*
Release Employee Information

The Release Employee Information function enables an employee to share information about themselves with another employee, often a manager, who would not usually have access to their records. Similarly, a manager can use this function to share information about one of their employees with a second manager.

See: Security Profiles (Oracle HRMS Applications User Guide)

The Release Employee Information function is available under predefined Manager and Employee responsibilities. Configuration options enable you to set up approvals processes for granting access.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service 4.0</td>
<td>Release Employee Information Mgr 4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Release Employee Information 4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:
Release Employee Information V4.0

Configurable Workflow Attributes:
Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Release Employee Information – Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CAED_TOP_SS</td>
<td>CAED Top Page</td>
</tr>
<tr>
<td>HR_CAED_SS</td>
<td>CAED Control Access to Employee Data</td>
</tr>
</tbody>
</table>
Release Employee Information – Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CAED_REVIEW_SS</td>
<td>CAED</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7–4

Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CAED_EMP_SEARCH</td>
<td>CAED: Grant Access</td>
<td>HR Instruction</td>
<td>Long Message</td>
<td>HR_INST_CAED_GRANT_ACCESS</td>
</tr>
<tr>
<td>HR_CAED_GRANTED_TABLE_HEADER</td>
<td>CAED Granted Employee Header Region</td>
<td>HR Instruction 1</td>
<td>Long Message</td>
<td>HR_INST_CAED_EXISTING_GRANTS</td>
</tr>
<tr>
<td>HR_CAED_PENDING_TABLE_HEADER</td>
<td>CAED Pending Employee Header Region</td>
<td>HR Instruction 2</td>
<td>Long Message</td>
<td>HR_INST_CAED_PENDING_GRANTS</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7–9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Levels</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR: CROSS_BUSINESS_SS_GROUP</td>
<td>Site</td>
<td>Yes/No</td>
<td>No</td>
</tr>
</tbody>
</table>

The Cross Business Group profile option determines whether employees from other business groups are retrieved in the employee search.

See: User Profiles (Oracle HRMS Applications User Guide)
Additional Configuration Steps

1. Configure the predefined user menus to include the Release Employee Information function.
   See: Defining User Access and Menus: page 5 – 12

2. If you want your managers to have access to employee data, ensure that the Allow Granted Access check box is flagged for the security profile assigned to the manager. This enables the manager to review the employee’s data.
   See: Security Profiles (Oracle HRMS Applications User Guide)
Review and Confirm

Most functions display the Review and Confirm pages. The Review page displays a corresponding region for each Web page section that you have updated as part of the preceding transaction. Inside each region is a list of current database and proposed transaction data. If you have configured approvals, you can enter approvals comments in this page. If you have enabled the Dynamic Approvals function, the user can see the default approval chain and add further approvers and notifiers.

When the user chooses the Submit button from the Review page, the transaction is committed to the Human Resources system or sent for approval. The Confirm page is then displayed. The Confirm page contains a confirmation message describing the status of the transaction. The user can print a copy of the submitted transaction for their records if required.

You can set up the approval properties for a process by changing the activity level attributes for the Review workflow functions.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Common functionality which is used by all processes.

Configurable Workflow Attributes:

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Page V4.0</td>
<td>HR_DYNAMIC_APPROVAL_LEVEL</td>
<td></td>
</tr>
<tr>
<td>Review Page V4.0</td>
<td>HR_APPROVAL_REQUIRED_FLAG</td>
<td></td>
</tr>
<tr>
<td>Review Page V4.0</td>
<td>Confirm Instruction Application Short Name</td>
<td></td>
</tr>
<tr>
<td>Review Page V4.0</td>
<td>Confirm Save Instruction Name</td>
<td></td>
</tr>
<tr>
<td>Review Page V4.0</td>
<td>Confirm Send for Approval Instruction Name</td>
<td></td>
</tr>
</tbody>
</table>

---

9 – 14 Implementing Oracle Self-Service Human Resources 4.0
**HR_DYNAMIC_APPROVAL_LEVEL:**

This attribute is used to specify the number of levels to which this transaction needs to be forwarded for approval in the approval hierarchy. For example, if the value is 1, the transaction is submitted for approval to one level higher than the initiating person. When the transaction has been approved, it is committed to the HRMS application. By default, this attribute reads the approval level from the APPROVAL_LEVEL (Approval Level) item level attribute. If you specify a value for the item level attribute, you can control the approval level for all the processes. If you specify a value for the HR_DYNAMIC_APPROVAL_LEVEL attribute, it overrides the item level attribute for the process for which you have specified the value.

**HR_APPROVAL_REQUIRED_FLAG:**

This attribute is used to specify whether the current transaction requires an approval. The valid values are:

- No: the process does not require approval
- Yes: the process requires approval but the dynamic approval user interface will not be shown in the review page. This means that the initiator cannot add additional approvers or notifiers.
- Yes – Dynamic Approval: the process requires approval and the dynamic approval user interface will be shown in the review page. The initiator can add additional approvers and notifiers.

**Confirm Instruction Application Short Name:**

In addition to the standard confirmation message shown in the confirmation page, you can also configure messages that are specific to the process. You can specify one for a scenario for which approval is required and one for a scenario for which no approval is required. Processes can be set to either Approval Required or Approval Not Required, but not both, using the HR_APPROVAL_REQUIRED_FLAG. For example, you can define a message for Confirm Save Instruction Name and Confirm Send for Approval Instruction Name. You register this message under your custom application.

**Confirm Send for Approval Instruction Name:**

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message. This text is only displayed when the process does not require approval.

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message.
message. This text is only displayed when the process requires approval.

**Note:** You must copy the delivered processes and make changes to the copy. If you make changes to the delivered processes, they will be overwritten when new patches are applied to your system.

See: Configuring Workflow Attribute Values: page 6 – 7

**Configurable Web Applications Dictionary Regions:**

The following definitions can be configured in the Configuration Framework:

**Regions**

**Review Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_REVIEW_TOP_SS</td>
<td>Review</td>
</tr>
<tr>
<td>HR_REVIEW_SS</td>
<td>Review Region</td>
</tr>
</tbody>
</table>

**Confirm Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONFIRM_TOP_SS</td>
<td>Confirmation</td>
</tr>
<tr>
<td>HR_REVIEW_SS</td>
<td>Review Region</td>
</tr>
</tbody>
</table>

**Note:** All the review regions associated to different transactions are added as nested regions under HR_REVIEW_SS. Make sure that you synchronize your update page review section definition to the corresponding review section. For example, if you change a label, change a flex segment list, or hide/show region items in the update page, you need to do the same in the corresponding review section.

**Nested Regions for the Review Module**

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Review Region</th>
<th>Region Item Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Other Employment Information</td>
<td>HR_OTHER-EMP_INFO_REVIEW_SS</td>
<td>HrOtherEmpInfo</td>
</tr>
<tr>
<td>Assignment</td>
<td>HR_ASSIGNMENT_REVIEW_SS</td>
<td>HrAssignment</td>
</tr>
<tr>
<td>Module Name</td>
<td>Review Region</td>
<td>Region Item Name</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Personal Information Basic Details</td>
<td>HR_BASIC_DETAIL_REVIEW_SS</td>
<td>HrBasicDetailsReview</td>
</tr>
<tr>
<td>Personal Information Phone Number</td>
<td>HR_PHONE_NUMBERS_REVIEW_SS</td>
<td>HrPhoneNumbersReview</td>
</tr>
<tr>
<td>Change Manager</td>
<td>HR_MANAGER_REVIEW_SS</td>
<td>HrManager</td>
</tr>
<tr>
<td>Pay Rate</td>
<td>HR_P_RATE_REVIEW_SS</td>
<td>HrPayRate</td>
</tr>
<tr>
<td>Termination</td>
<td>HR_TERMINATION_REVIEW_SS</td>
<td>HrTermination</td>
</tr>
<tr>
<td>Personal Information Main Address</td>
<td>HR_MAIN_ADDRESS_REVIEW_SS</td>
<td>HrMainAddressReview</td>
</tr>
<tr>
<td>Personal Information Secondary Address</td>
<td>HR_SECOND_ADDRESS_REVIEW_SS</td>
<td>HrSecondaryAddressReview</td>
</tr>
<tr>
<td>Tertiary Address</td>
<td>HR_TERTIARY_ADDRESS_REVIEW_SS</td>
<td>HrTertiaryAddressReview</td>
</tr>
<tr>
<td>Location</td>
<td>HR_CHANGE_LOCATION_REVIEW_SS</td>
<td>HrChangeLocation</td>
</tr>
<tr>
<td>Work Schedule</td>
<td>HR_WORK_SCHED_REVIEW_SS</td>
<td>HrWorkSchedule</td>
</tr>
<tr>
<td>Education and Qualifications</td>
<td>HR_QUALIFICATIONS_REVIEW_SS</td>
<td>HrQualification</td>
</tr>
<tr>
<td>Awards</td>
<td>HR_AWARDS_REVIEW_SS</td>
<td>HrAward</td>
</tr>
<tr>
<td>Tenure Status</td>
<td>PQH_TENURE_STATUS_REVIEW</td>
<td>PqhTenureStatusReview</td>
</tr>
<tr>
<td>Academic Rank</td>
<td>PQH_ACADEMIC_RANK_REVIEW</td>
<td>PqhAcademicRankReview</td>
</tr>
<tr>
<td>Release Employee Information</td>
<td>HR_CAED_REVIEW_SS</td>
<td>HrCAED</td>
</tr>
<tr>
<td>Benefits</td>
<td>BEN_COMP_REVIEWCONTENT_SS</td>
<td>BenCompensation</td>
</tr>
<tr>
<td>Contacts Delete</td>
<td>HR_CONTACT_DELETE_REVIEW_SS</td>
<td>HrContactsDelReview</td>
</tr>
<tr>
<td>Contacts</td>
<td>HR_CONTACTS_REVIEWCONTENT_SS</td>
<td>HrContacts</td>
</tr>
<tr>
<td>Competence Profile</td>
<td>HR_COMP_REVIEWSS</td>
<td>HrCompetence</td>
</tr>
</tbody>
</table>

Common SSHR Functions 9 – 17
<table>
<thead>
<tr>
<th>Module Name</th>
<th>Review Region</th>
<th>Region Item Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Payment Methods</td>
<td>PAY_PAYMENTS_REVIEW_SS</td>
<td>PayPayments</td>
</tr>
<tr>
<td>Work Preferences</td>
<td>HR_WP_REVIEW_SS</td>
<td>HrWorkPreferenceReview</td>
</tr>
<tr>
<td>W4 Tax Information</td>
<td>PAY_W4_REVIEW_SS_HEADER</td>
<td>PayW4ReviewSsHeader</td>
</tr>
<tr>
<td>Special Information Types</td>
<td>HR_PERSON_SIT_REVIEW_SS</td>
<td>HrSIT</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

Not applicable
New User Registration

Self-service registration for new users helps to reduce the workload and costs of HR administration. HR professionals can use this feature to add new employees to the Oracle HRMS database. The self-service approach reduces the rollout effort for large companies where the HR department is not centrally located. You can add or edit user-friendly tips and text messages in the user interface to reduce the need for end user training.

You can also use self-service registration to help shift the workload from the HR department onto the hiring line manager or even the individual employees by allowing them to register their own employee details.

Using the **New Employee Registration** function, employees log on with a generic company user name and supplied password or they access the function directly with a “guest login”, which is invisible to users. They complete online registration, giving details such as name, address, employment details, and family members. They can create their own self-service user names and passwords (or you can choose to generate these automatically). Alternatively, HR administrators or line managers can create the employee records and self-service user names for their new hires.

Using the **Non-employee Registration** function, other people can log on to create non-employee records in Oracle HRMS. This is most commonly used by US third party benefits providers using Oracle Advanced Benefits. It enables benefits participants or their dependents who become COBRA qualified due to a life event (such as divorce or termination) to register so they can elect their COBRA coverage through self-service.

Using the **Create User Name** function, people who already have an HR record in the database can create their own self-service user names and passwords. This function provides an alternative to the existing methods of creating users, which are using the Users window or creating self-service users in a batch.

Benefits Registration

If you have implemented Standard Benefits or Oracle Advanced Benefits, benefits participants can register directly with you through the World Wide Web or over a corporate intranet. If you are a third party benefits administrator or provider, this means that employees’ HR departments are no longer responsible for transferring HR information to your database.
Once a person completes the registration, they can navigate directly to the Self-Service Benefits functions, which process detected life events that enable benefits elections or unrestricted program elections.

**Generic Users and Responsibilities**

You give a generic user name and password to people, enabling them to access self-service initially to register. You can choose how many generic user names you create. For example, a third party benefits provider is likely to create one generic user name for each subscriber organization. Employers might create one user name for the entire business group, or different names based on the organization hierarchy structure.

**Default Organization**

Each user name is associated with an organization using the profile option OAB:User to Organization Link. This defaults the organization for a new employee assignment, but the user can select another organization from the business group during registration. You can set this profile option at the responsibility level—to link each generic user name with a separate organization—or at the site, or application levels.

**Default Payroll**

Similarly, for each generic user name you can select the default payroll to be assigned, by setting the profile option OAB:User to Payroll Link at the responsibility level. You can also set this profile option at the site, or application levels.

**Default Responsibility**

By default, all newly registered users are assigned the seeded Self Registered Employee Default responsibility. This responsibility gives them access to a subset of self-service functions, such as Self-Service Benefits enrollment, person name, address, and contact information. You can create your own responsibilities and assign them to responsibilities, or the whole site by setting the OAB: Self Registered User Responsibility profile option at the appropriate level.
Setting Up a Generic User ID For New User Registration

Follow these steps to create the generic user name and password that will enable new employees, managers, and other users to access self-service to register themselves in your database. These steps are required if you are using any of the following processes:

- New Employee Registration
- Non-employee Registration
- Create User Name

If you are implementing new user registration in more than one business group, see: Setting Up Generic User IDs in Multiple Business Groups: page 9 – 24. If you are implementing new user registration within a single business group, use the following procedure.

If you are only implementing the Create User Name process (that is, you are using self-service to create new users but not to create HRMS records), you can omit steps 7 and 8.

**To set up self-service registration in a single business group:**

1. If you are a third party benefits provider, create an organization to represent each subscriber organization or company in which you are providing benefits.

   If you are not a third party benefits provider, you create your HR organization hierarchy as required within your business group. Skip the next step since it applies to third parties who administer multiple companies within a single business group.

   See: Creating an Organization, Using Oracle HRMS – The Fundamentals

   See: Adapting and Creating a New Business Group, Using Oracle HRMS – The Fundamentals

2. **Third party benefits providers using Oracle Advanced Benefits only:** Establish a link between your organizations and the relevant benefits program. For example, link each subscriber organization to the subscriber’s benefit program. Use the Organizations tabbed region of the Programs window.

   This link enables the Participation process to select the appropriate benefit programs for a particular organization when processing people within that organization. This enhances system performance by limiting the retrieval of records to the person’s organization. The process selects the programs pertaining to that organization and then examines the person’s eligibility restrictions.
**Note:** Set the system profile *Limit By Persons Organization* to Yes to enable this feature for the Benefit Service Center window. Set the *Limit to Organization* parameter to limit the Participation batch process.

See: Defining a Benefits Program, *Managing Total Compensation Using Oracle HRMS*

See: Associating an Organization with a Benefits Program, *Managing Total Compensation Using Oracle HRMS*

3. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non-employee Registration and Create User Name functions in self-service.

   If you only need one generic user name for the business group, you can use the predefined New User Registration responsibility. Otherwise, create a copy of the New User Registration responsibility for each organization for which you will create a separate generic user name. You might want more than one responsibility for each organization. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self-service user name and password. This would reduce errors by giving each person access to one function only.

4. Create a generic user name and password for the business group or for each organization, so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process: page 9 – 32.

   See: Users Window, *Oracle Applications System Administrator’s Guide*

5. Add the New User Registration responsibility (or the responsibilities you created in step 3) to the generic user name for each organization.

6. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

7. Update the OAB:User to Organization Link system profile at the responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

   **Attention:** Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.
8. Update the profile OAB User to Payroll Link at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

Attention: Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

9. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations. If it is not, create any new self–service responsibilities you require.

Note: The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self–service web pages after the initial registration.

10. If you created just one new responsibility in the previous step, change the profile OAB: Self Registered User Responsibility at the site level to point to your new responsibility. If you created a different responsibility for each organization, add it to the profile OAB: Self Registered User Responsibility at the responsibility level for the New User Registration responsibility (or your copies).

Note: Oracle delivers the system profile OAB: Self Registered User Responsibility with the seeded value of Self Registered Employee Default Responsibility predefined at the site level. The self–service menu for this seeded responsibility gives access to only a subset of employee self–service transactions.

11. Log into Self–Service with the user name and password you created.

As the system administrator, the first time you log into self–service, you gain access by using the password you created in step 4. After entering it, you must change the password to a generic password you want the new people to use when accessing self–service initially to register.

12. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB:Self Registered User Responsibility profile (step 10) to the new user name.
Setting Up Generic User IDs in Multiple Business Groups

This procedure is appropriate for third party benefit providers who are creating a separate business group for each company or subscriber organization. It is also appropriate for employers or third party administrators who have multiple business groups on a single database.

To set up self-service registration in multiple business groups:

1. Third party benefits providers: Create a business group to represent each subscriber organization or company in which you are providing benefits. In each business group, create an HR organization for the subscriber.

   Employers: Decide how many generic user names you want to create. You will need at least one generic user name for each business group. You may want to create separate user names for the organizational hierarchies within each business group.

   See: Creating an Organization, Using Oracle HRMS – The Fundamentals

   See: Adapting and Creating a New Business Group, Using Oracle HRMS – The Fundamentals

2. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non-employee Registration and Create User Name functions in self-service.

   Create a copy of the New User Registration responsibility for each business group. You might want more than one responsibility for each business group. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self-service user name and password. This would reduce errors by giving each person access to one function only.

3. Create a generic user name and password for each organization so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process: page 9 – 32.

   See: Users Window, Oracle Applications System Administrator’s Guide

4. Add your copy of the New User Registration responsibility to the generic user name for each organization.
5. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

6. Update the OAB:User to Organization Link system profile at the user or responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

   **Attention:** Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.

   See: System Profile Values Window, Oracle Applications System Administrator's Guide

7. Update the profile OAB User to Payroll Link at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

   **Attention:** Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

8. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations.

   • If it is not, create any new self-service responsibilities you require.

   • If it is, create a copy for each organization.

   Update the system profile HR:Business Group at the responsibility level to point to the correct business group.

   **Note:** The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self-service web pages after the initial registration.

9. Update the system profile OAB: Self Registered User Responsibility at the responsibility level with the name of the responsibility to use for that organization (created in step 8).

   **Note:** Oracle delivers the system profile OAB: Self Registered User Responsibility with the seeded value of Self Registered Employee Default Responsibility predefined at the site level.
The self-service menu for this seeded responsibility gives access to only a subset of employee self-service transactions.

10. Log into Self-Service with the user name and password you created.

As the system administrator, the first time you log into self-service, you gain access by using the password you created in step 3. After entering it, you must change the password to the generic password you want new people to use when accessing self-service initially to register.

11. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB:Self Registered User Responsibility profile (step 9) to the new user name.
Configuring the New Employee and Non–Employee Registration Processes

These processes are part of the Human Resources Self–Service item type. The New Employee Registration process displays the pages for new employees to create HR records and self–service user names for themselves. The Non–employee Registration process creates person records in the HRMS system for people who are not employees. This process is used by US benefit providers who have licensed Oracle Advanced Benefits to display pages for participants or dependents to register on the system to elect COBRA coverage.

These processes include, by default, the following pages:

<table>
<thead>
<tr>
<th>Page</th>
<th>Required?</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>No</td>
<td>This page includes a checklist of information that new users must have when entering their registration, and a legal agreement that users must agree to before proceeding.</td>
</tr>
<tr>
<td>Verification</td>
<td>No</td>
<td>This page has the user enter minimal information about themselves. This way the system can check for their existence on the database before they attempt to register their data.</td>
</tr>
<tr>
<td>Basic Details</td>
<td>Yes</td>
<td>Users enter marital status, and other personal data.</td>
</tr>
<tr>
<td>Main Address</td>
<td>Yes</td>
<td>Users can enter a primary address and two other addresses.</td>
</tr>
<tr>
<td>Phone Numbers</td>
<td>No</td>
<td>Users can enter the phone numbers they require.</td>
</tr>
<tr>
<td>Assignment</td>
<td>Yes, for New Employee process (not in non–employee process)</td>
<td>Employees can fill in information about their organization, job, position, grade, payroll, assignment status, people group, and additional employment information.</td>
</tr>
<tr>
<td>Page</td>
<td>Required?</td>
<td>Purpose</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Family Member Coverage</td>
<td>No</td>
<td>This page simply asks users whether they wish to enter details of other family members. If they confirm that they do, the Add Family Members page appears.</td>
</tr>
<tr>
<td>Add Family Members</td>
<td>No</td>
<td>Users can enter names, addresses, phone numbers, and additional personal information for as many contacts as they require.</td>
</tr>
<tr>
<td>Life Events</td>
<td>No</td>
<td><strong>Relevant to US Third Party Benefits providers only.</strong> Users can select the life event that has made them eligible for a benefits program. This creates a potential life event for the person. <strong>NOTE:</strong> Employers must remove this page from the process.</td>
</tr>
<tr>
<td>User Name</td>
<td>No</td>
<td>On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.</td>
</tr>
<tr>
<td>Review</td>
<td>Yes</td>
<td>This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.</td>
</tr>
<tr>
<td>Confirmation</td>
<td>No</td>
<td>If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.</td>
</tr>
</tbody>
</table>

**Note:** It is not currently possible to route the information entered by the user for approval by workflow. You can set up Alerts to notify the HR administrator that a new person record has been created.

To configure the Registration processes, you make some changes using Workflow Builder and others using the Configuration Framework.
Using Workflow Builder

To configure the New Employee and Non–employee Registration workflows:

1. Decide which pages you want to use in the process. You must include Personal Details, Main Address, Review, Cancel, and—for the New Employee Registration process only—Employment Details (to identify the correct organization).

   To delete pages, delete the corresponding activities from the workflow process.

   Employers must delete the Life Event page from the registration process. Oracle Advanced Benefits customers can use life event triggers in the database to determine benefit enrollment opportunities. There are no life event restriction capabilities in Standard Benefits.

2. Decide in what sequence you want pages to appear. The Introduction page normally appears first, followed by Personal Details. The only pages that can come before Personal Details are Introduction and Verification. For the Non–employee Registration workflow, the life event page must be before the Personal Details page.

   To change the sequence of pages, edit the workflow process diagram.

   See: Configuring Workflow Objects: page 6 – 5

Using the Configuration Framework

For each region, decide which region items you want to display. If you have implemented Standard Benefits or Oracle Advanced Benefits, ensure you are including all the fields that capture information required to assess benefits eligibility.

On the Personal Information page:

- You must display the Last Name, Gender and Hire Date fields.
- If you use rates, and therefore need a Payroll, you must require a birth date.
- In non–US countries, you should hide the field Covered Under Medicare.
- Make the Employee Number field enterable if you do not generate employee numbers in your business group.
On the Employment Information page (New Employee Registration only):

- You must display the Organization field.
- If you use rates or element entries, you must display the Payroll field.
- In localizations that use GRE, you should display the GRE field.

On the Verification page:

- You can add fields to assist the search, such as national identifier (for example, social security number), person descriptive flexfields, employee number, and email address.
- If the information entered on the Verification page matches more than one person, the application displays a table of the duplicates so the user can choose one. Decide what information to include in this table. You can add birth date, Social Security Number, employee number, person descriptive flexfields, and FND username.

For a list of configurable regions, see: New Employee Registration and Non–employee Registration: page 9 – 36.

See also: Configuring Web Pages: page 7 – 4

Setting Up Life Events (Advanced Benefits only)

This section is relevant only to third party benefits providers who are including the Life Events page in the process flows. Employers who use Oracle Advanced Benefits should rely on life event triggers to determine the necessary processing instead of using this page.

You determine which life events appear on the Life Events page by the Selectable for Self–Service code you enter when you define the life event in the professional user interface. The code choices are:

- All—meaning that the life event can be selected in all self–service processes that use the Life Events page.
- Basic Registration—meaning that the life event can be selected in the New Employee Registration process
- COBRA Registration—meaning that the life event can be selected in the Non–employee Registration process
- Basic and COBRA Registration—meaning that the life event can be selected in both the New Employee and the Non–employee Registration processes
Colliding Life Events

When a person selects a life event from this page, the process will insert the event as a potential life event for the person. By completing the rest of the registration process, the person may have other life events detected due to life event triggers in the business group. Ensure that your life event collapsing and collision logic leaves a user with just one "winning" potential life event during the Participation Process. You could do this by one of the following approaches:

- Ensuring that all life events that can be selected in Registration have the Override check box selected (and other life events that might be triggered do not). Then, during setup of collapsing life events, you could choose which event should win if there is more than one overriding event.

- Turning off automatic triggering of life events

- Removing Life Event page from workflow and configuring life event triggers in the business group to be detected based on data entered by the person during the registration process. This is the approach that employers should use to determine data changes that may give the person an opportunity to make benefit election changes.
Configuring the Create User Name Process

The Create User Name Process workflow within the Human Resources Self-Service item type displays the pages for people who already have a record on the HR database to create their own self-service user names and passwords.

This process includes, by default, the following pages:

<table>
<thead>
<tr>
<th>Page</th>
<th>Required?</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verification</td>
<td>Yes</td>
<td>This page has the user enter minimal information about themselves. This page must find one and only one person matching the information entered so that the User is connected to the correct HR record</td>
</tr>
<tr>
<td>User Name</td>
<td>Yes</td>
<td>On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.</td>
</tr>
<tr>
<td>Review</td>
<td>Yes</td>
<td>This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.</td>
</tr>
<tr>
<td>Confirmation</td>
<td>No</td>
<td>If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.</td>
</tr>
</tbody>
</table>

To configure the Create User Name process:

1. Decide whether users should log on to use this process with a generic company ID or with a guest ID (which would happen automatically and be invisible to the user).

2. If you decide to use a company ID for extra security:
   - Decide whether to create an ID specific to this process, or shared with the new employee registration process. This determines whether the user sees a menu of processes after logging on, or is taken straight to the Create User Name process.
• Decide how to communicate the company IDs to your users. One approach—if you have licensed Oracle Advanced Benefits—is to create a new communication type and use the Determine Communications batch process. This approach will only work for people currently in the database.

3. If you decide to use a guest ID, there are three approaches you can use. Do one of the following:

• In the Users window, create the guest user with the user name GUESTOAB and the password GUESTOAB. You can grant this user the predefined New User Registration responsibility or your copy of it. Log on using this user to change the password to WELCOME.

Call the supplied pl/sql procedure ben_guest_user_api without passing a user name and password. The procedure uses user name GUESTOAB and the password WELCOME. It passes the user name and unencrypted password into the call to oraclehomepage.home().

Note: Call ben_guest_user_api from a URL in this way: [APPS_WEB_AGENT]ben_guest_user_api.login?i_1=USERNAME&i_2=PASSWORD&rmode=2

• In the Users window, create the guest user with any name and password. Log on using this user to change the password.

Call the supplied pl/sql procedure ben_guest_user_api, passing a user name and unencrypted password. (For the format of the call, see the Note above) If the user name is passed in, the password must be too, or the procedure returns an error. The procedure passes the user name and unencrypted password into the call to oraclehomepage.home().

• Call oraclehomepage.home directly passing a user name/password if desired. (For example, oraclehomepage.home?userid=<your user name>&password=<your password>).

4. On the Verification page:

• Decide what information a user must enter on the Verification page of the system to identify the existing HR person record. By default this information is: first name, last name, and birth date. You can add the following fields: national identifier (such as social security number), employee number, email address, supervisor, organization, location, address, and person flexfields.

• Decide what to display if the information entered on the Verification page matches more than one person. By default, the application displays an error.
For a list of configurable regions, see: Create User Name: page 9 – 41.

5. Decide what should happen if users try to create a user name when they do not have an existing HR record. By default the application issues an error directing the user to retry or Cancel to the menu and contact their administrator. You can configure the message text and the URL associated with the Cancel button. For example, the Cancel button could take them straight to the New Employee Registration process, rather than to the menu.

6. Determine which responsibility to assign to the new users. By default, all new users are granted the responsibility set in the OAB:Self Registered User Responsibility profile option. You may wish to configure this to vary the responsibility by the person type (especially employee versus non-employee).

To do this, you can create different generic IDs (and responsibilities) for different groups of users and change the OAB:Self Registered User Responsibility profile option at responsibility level.
Generating Self–Service User Names and Passwords

When a person has registered themselves in the HR database, you can choose to generate their self–service user name and password, rather than have them create their own. You can implement this using user hooks.

➢ To generate user names and passwords:

1. Write the PL/SQL to generate the user names and passwords as you require, using the user hooks.


2. Optionally, edit the instruction text on the User ID page, hide the user name and password fields, and change the button label from Next to Generate.

3. Consider how you will inform users of their user name. One approach—for Oracle Advanced Benefits customers—is to use a user hook to call your own code that populates the communication tables, and use this information to alert your users. Another approach is to generate the user names in a standard and predictable way from users’ names or national identifiers.
New Employee Registration and Non–employee Registration

These modules are available under the predefined New User Registration Responsibility. They can be used as part of employee self–service or manager self–service. Using New Employee Registration, users log on with a generic user name to create their own employee records in Oracle HRMS, and their own self–service user name and password. Using Non–employee Registration, other people can log on to create non–employee records in your Oracle HRMS.

Menu and Function Names

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>New User Registration</td>
<td>New Employee Registration</td>
</tr>
<tr>
<td>New User Registration</td>
<td>Non–employee Registration</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:

New Employee Registration Process and COBRA Registration Process
See: Oracle Workflow Guide (available on Metalink)

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

For the Personal Information pages (Basic Details, Main Address, Secondary Address, Phone Numbers, and Contacts) see: Personal Information Modules: page 10 – 2. For the Assignment page, see Assignment: page 11 – 4.
The Registration modules have introduced some new regions and pages:

### Tertiary Address Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_TERTIARY_ADDRESS_REVIEW_SS</td>
<td>Other Address</td>
</tr>
<tr>
<td>HR_TERTIARY_ADDRESS_OVIEW_SS</td>
<td>Tertiary Address Overview</td>
</tr>
</tbody>
</table>

### Assignment Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PAYROLL_SS</td>
<td>Payroll</td>
</tr>
<tr>
<td>HR_GRE_SS</td>
<td>GRE</td>
</tr>
</tbody>
</table>

### Introduction Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_AGRMT_CHKLIST_PAGE</td>
<td>Oracle Self-Service Human Resources: Agreement Checklist</td>
</tr>
<tr>
<td>BEN_AGRMT_CHKLIST_MAIN_CONTENT</td>
<td>Agreement Checklist Main Content</td>
</tr>
<tr>
<td>BEN_AGRMT_CHKLIST_AGRMT_CONT</td>
<td>Agreement Content</td>
</tr>
</tbody>
</table>

### Family Member Coverage Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_CONTACTS_YES_NO_PAGE</td>
<td>Oracle Self-Service Human Resources: Add Contacts</td>
</tr>
<tr>
<td>BEN_CONTACTS_YES_NO_CONTENT</td>
<td>Family Member Coverage</td>
</tr>
</tbody>
</table>
## Life Event Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_LIFE_EVENT_PAGE</td>
<td>Oracle Self-Service Human Resources: Life Events</td>
</tr>
<tr>
<td>BEN_LIFE_EVENT_CONTENT</td>
<td>Ben Life Event Content</td>
</tr>
<tr>
<td>BEN_LIFE_EVENT_COBRA</td>
<td>Ben Life Event Cobra</td>
</tr>
<tr>
<td>BEN_LIFE_EVENT_CURRENT</td>
<td>Ben Life Event Current</td>
</tr>
<tr>
<td>BEN_LIFE_EVENT_REVIEW_SS</td>
<td>Life Event Review</td>
</tr>
</tbody>
</table>

## Cancellation Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_REGCANCEL_PAGE</td>
<td>Oracle Self-Service Human Resources: Cancellation</td>
</tr>
<tr>
<td>BEN_REGCANCEL_MAIN_CONTENT</td>
<td>Registration Cancel Main Content</td>
</tr>
</tbody>
</table>

## Decline Agreement Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_REGDECLINE_PAGE</td>
<td>Oracle Self-Service Human Resources: Decline Agreement</td>
</tr>
<tr>
<td>EN_REGDECLINE_MAIN_CONTENT</td>
<td>Registration Decline Main Content</td>
</tr>
</tbody>
</table>

## User Name Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_USER_PAGE</td>
<td>Oracle Self-Service Human Resources: Registration User</td>
</tr>
<tr>
<td>BEN_USER_MAIN_CONTENT</td>
<td>Registration User Main Content</td>
</tr>
<tr>
<td>BEN_USER_REVIEW_SS</td>
<td>Registration User Review Content</td>
</tr>
</tbody>
</table>
Verification Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_REG_VERIFICATION_PAGE</td>
<td>Oracle Self–Service Human Resources: Verification</td>
</tr>
<tr>
<td>BEN_VERIFICATION_MAIN_CONTENT</td>
<td>Verification Main Content</td>
</tr>
<tr>
<td>BEN_VERIFICATION_CONTENT</td>
<td>Verification Content</td>
</tr>
<tr>
<td>BEN_VERIFICATION_PER_CONTENT</td>
<td>Verification Registered People</td>
</tr>
<tr>
<td>BEN_VERIFICATION_PER_TABLE</td>
<td>Verification Person Table</td>
</tr>
<tr>
<td>BEN_VERIFICATION_WARNING</td>
<td>Ben Verification Warning</td>
</tr>
</tbody>
</table>

See: Configuring Regions and Region Items: page 7 – 4

Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_LIFE_EVENT_COBRA</td>
<td>Ben Life Event Cobra</td>
<td>Ben Effective Date</td>
<td>Message</td>
<td>BEN_COBRA_LIFE_EVENT_DATE</td>
</tr>
<tr>
<td>BEN_LIFE_EVENT_COBRA</td>
<td>Ben Life Event Cobra</td>
<td>Life Event Name</td>
<td>Message</td>
<td>BEN_LIFE_EVENT_COBRA</td>
</tr>
<tr>
<td>BEN_LIFE_EVENT_CURRENT</td>
<td>Ben Life Event Current</td>
<td>Ben Effective Date</td>
<td>Message</td>
<td>BEN_LIFE_EVENT_DATE</td>
</tr>
<tr>
<td>BEN_LIFE_EVENT_CURRENT</td>
<td>Ben Life Event Current</td>
<td>Life Event Name</td>
<td>Message</td>
<td>BEN_LIFE_EVENT_CURRENT</td>
</tr>
<tr>
<td>BEN_USER_MAIN_CONTENT</td>
<td>Registration User Main Content</td>
<td>User Password</td>
<td>Short Tip</td>
<td>HR_INCORRECT_PASSWORD_LENGTH</td>
</tr>
<tr>
<td>BEN_VERIFICATION_CONTENT</td>
<td>Verification Content</td>
<td>Date of Birth</td>
<td>DATE_FORMAT</td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_VERIFICATION_CONTENT</td>
<td>Verification Content</td>
<td>Additional Personal Details Flex</td>
<td>PER_PEOPLE</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Levels</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>OAB: User to Organization Link</td>
<td>All</td>
<td>Organizations</td>
<td>Null</td>
</tr>
<tr>
<td>OAB User to Payroll Link</td>
<td>All</td>
<td>Payrolls</td>
<td>Null</td>
</tr>
<tr>
<td>OAB: Self Registered User Responsibility</td>
<td>All</td>
<td>Responsibilities</td>
<td>Self Registered Employee Default Responsibility</td>
</tr>
<tr>
<td>HR: Business Group</td>
<td>Set at Responsibility level</td>
<td>Business groups</td>
<td></td>
</tr>
<tr>
<td>HR: Self Service HR Licensed</td>
<td>Site—set to Yes</td>
<td>Yes/No</td>
<td>No</td>
</tr>
</tbody>
</table>

See: User Profiles (Oracle HRMS Applications User Guide)
Create User Name

This module is available under the predefined New User Registration Responsibility. It can be used as part of employee self-service. Using Create User Name, people who already have an HR record in Oracle HRMS can create their own self-service user names and passwords.

Menu and Function Names

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>New User Registration</td>
<td>Create User Name</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:
- Create User Name Process

See: Oracle Workflow Guide (available on Metalink)

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:
- Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

User Name Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_USER_PAGE</td>
<td>Oracle Self-Service Human Resources: Registration User</td>
</tr>
<tr>
<td>BEN_USER_MAIN_CONTENT</td>
<td>Registration User Main Content</td>
</tr>
<tr>
<td>BEN_USER_REVIEW_SS</td>
<td>Registration User Review Content</td>
</tr>
</tbody>
</table>
Verification Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_NEW_USER_VER_PAGE</td>
<td>Oracle Self-Service Human Resources: New User Verification</td>
</tr>
<tr>
<td>BEN_NEW_USER_VER_CONTENT</td>
<td>New User Creation Verification Content</td>
</tr>
</tbody>
</table>

See: Configuring Regions and Region Items: page 7 – 4

Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_NEW_USER_VER_CONTENT</td>
<td>New User Creation Verification Content</td>
<td>Date of Birth</td>
<td>DATE_FORMAT</td>
<td></td>
</tr>
<tr>
<td>BEN_USER_MAIN_CONTENT</td>
<td>Registration User Main Content</td>
<td>User Password</td>
<td>Short Tip</td>
<td>HR_INCORRECT_PASSWORD_LENGTH</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_NEW_USER_VER_CONTENT</td>
<td>New User Creation Verification Content</td>
<td>Additional Personal Details Flex</td>
<td>PER_PEOPLE</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5
## Configurable Profile Options

<table>
<thead>
<tr>
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<th>Configurable Levels</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>OAB: Self Registered User</td>
<td>All</td>
<td>Responsibilities</td>
<td>Self Registered Employee Default Responsibility</td>
</tr>
<tr>
<td>Responsibility</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR: Business Group</td>
<td>Set at Responsibility level</td>
<td>Business groups</td>
<td></td>
</tr>
<tr>
<td>HR: Self Service HR Licensed</td>
<td>Site—set to Yes</td>
<td>Yes/No</td>
<td>No</td>
</tr>
</tbody>
</table>

See: User Profiles *(Oracle HRMS Applications User Guide)*
CHAPTER 10

Employee Demographics
Personal Information Modules

The Personal Information function enables employees to enter and update their own personal records. This function is integrated within Oracle Workflow. By using Oracle Workflow and the Web Applications Dictionary, you can design a process to control which personal details an employee can change or display. You can also design an approval process for any changes made by employees or managers. The Personal Information function can be used to update basic details such as Marital Status, Title, First and Last Name, Addresses, Emergency Contacts, and Dependents and Beneficiaries.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:
Personal Information V4.0

Configurable Workflow Attributes:
Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Summary Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_OVERVIEW_TOP_SS</td>
<td>Top Region</td>
</tr>
<tr>
<td>HR_OVERVIEW_CONTENT_SS</td>
<td>Overview Page 1st Level Nested Region</td>
</tr>
</tbody>
</table>
### Region Code

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_BASIC_DETAIL_OVIEW_SS</td>
<td>Basic Details</td>
</tr>
<tr>
<td>HR_PHONE_OVIEW_SS</td>
<td>Phone Numbers</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_OVIEW_SS</td>
<td>Main Address</td>
</tr>
<tr>
<td>HR_SECONDARY_ADDRESS_OVIEW_SS</td>
<td>Other Address</td>
</tr>
<tr>
<td>HR_TERTIARY_ADDRESS_OVIEW_SS</td>
<td>Other Address</td>
</tr>
<tr>
<td>HR_CONTACTS_OVERVIEW_CONT_SS</td>
<td>Family and Friends</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

### Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_BASIC_DETAIL_ACCT_TYPE_SS</td>
<td>Basic Details</td>
<td>Action Type</td>
<td>Dynamic Label</td>
<td>HR_INST_BASIC_DETAILS_TOC</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_EFFECTIVE_DATE</td>
<td>Long Message</td>
<td>HR_TIP_EFFECTIVE_DATE</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>Prefix</td>
<td>Long Message</td>
<td>HR_TIP_PREFIX</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_SUFFIX</td>
<td>Long Message</td>
<td>HR_TIP_SUFFIX</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>Preferred Name</td>
<td>Long Message</td>
<td>HR_TIP_PREFERRED_NAME</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_PREV_LAST_NAME</td>
<td>Long Message</td>
<td>HR_TIP_PREVIOUS_LASTNAME</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_Instruction</td>
<td></td>
<td>HR_INST_BASIC_DETAILS_FORM</td>
</tr>
<tr>
<td>HR_PHONE_OVIEWW_SS</td>
<td>Phone Numbers Overview</td>
<td>HR_Instruction</td>
<td></td>
<td>HR_PERINFO_PHONES_ABOVE_LIMIT</td>
</tr>
<tr>
<td>HR_PHONE_NUMBERS_SS</td>
<td>Phone Numbers Update</td>
<td>hrphonetext</td>
<td></td>
<td>HR_INST_PHONES_FORM</td>
</tr>
<tr>
<td>Region ID</td>
<td>Region Name</td>
<td>Attribute Name</td>
<td>Tip Type</td>
<td>Message Name</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------</td>
<td>-----------------------</td>
<td>-----------</td>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESSES_UPDATE_SS</td>
<td>Main Address Update</td>
<td>hraddressseffctdate</td>
<td>Long</td>
<td>HR_TIP_MADDR_EFFECTIVE_DATE</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESSES_UPDATE_SS</td>
<td>Main Address Update</td>
<td>hraddress-seffctdate</td>
<td>Long</td>
<td>HR_TIP_MADDR_ADDRESS_TYPE</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESSES_UPDATE_SS</td>
<td>Main Address Update</td>
<td>HRAddress-CorrectInst</td>
<td>HR_INST_MAIN_CORRECT_ADDRESS</td>
<td></td>
</tr>
<tr>
<td>HR_MAIN_ADDRESSES_UPDATE_SS</td>
<td>Main Address Update</td>
<td>HRAddress-NewChgInst</td>
<td>HR_INST_MAIN_NEW_CHG_ADDRESS</td>
<td></td>
</tr>
<tr>
<td>HR_MAIN_ADDRESSES_UPDATE_SS</td>
<td>Main Address Update</td>
<td>HRAddress-ViewFutureInst</td>
<td>HR_INST_VIEW_FUTURE_ADDRESS</td>
<td></td>
</tr>
<tr>
<td>HR_ADDR_ACTION_TYPE_SS</td>
<td>Main Address Action Type</td>
<td>Dynamic Label</td>
<td>HR_INST_MAIN_ADDRESS_TOC</td>
<td></td>
</tr>
<tr>
<td>HR_SECONDARY_ADDRESS_OVIEW_SS</td>
<td>Secondary Address Overview</td>
<td>HR Instruction</td>
<td>HR_PERINFO_MULTIPLE_ADDRESSES</td>
<td></td>
</tr>
<tr>
<td>HR_SECONDARY_ADDRESS_ACTION_TYPE_SS</td>
<td>Secondary Address Action</td>
<td>Dynamic Label</td>
<td>HR_INST_SECONDARY_ADDRESS_TOC</td>
<td></td>
</tr>
<tr>
<td>HR_SECOND_ADDRESSES_UPDATE_SS</td>
<td>Second Address Update</td>
<td>hraddressseffctdate</td>
<td>Long</td>
<td>HR_TIP_SADDR_EFFECTIVE_DATE</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESSES_UPDATE_SS</td>
<td>Second Address Update</td>
<td>hraddress-seffctdate</td>
<td>Long</td>
<td>HR_TIP_SADDR_ADDRESS_TYPE</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESSES_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HRAddress-CorrectInst</td>
<td>HR_INST_SCND_CORRECT_ADDRESS</td>
<td></td>
</tr>
<tr>
<td>HR_SECOND_ADDRESSES_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HRAddress-NewChgInst</td>
<td>HR_INST_SCND_NEW_CHG_ADDRESS</td>
<td></td>
</tr>
<tr>
<td>HR_SECOND_ADDRESSES_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HRAddress-ViewFutureInst</td>
<td>HR_INST_VIEW_FUTURE_ADDRESS</td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
### FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
<td>hraddressflex</td>
<td>Address Structure</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>hraddressflex</td>
<td>Address Structure</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_REVIEW_SS</td>
<td>Main Address Review</td>
<td>hraddressflex</td>
<td>Address Structure</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_REVIEW_SS</td>
<td>Second Address Review</td>
<td>hraddressflex</td>
<td>Address Structure</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

### Configurable Profile Options

Not applicable
Basic Details

The Basic Details module records information such as the employee’s name and marital status.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Basic Details V4.0

See: Oracle Workflow Guide (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Basic Details Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_BASIC_DET_ACT_TYPE_TOP_SS</td>
<td>Basic Details Action</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_ACT_TYPE_SS</td>
<td>Basic Details Action 1st Level Nested Region</td>
</tr>
</tbody>
</table>
## Employee Demographics

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_BASIC_DET_UPDATE_TOP_SS</td>
<td>Basic Details</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_UPDATE_SS</td>
<td>Basic Details 1st Level Nested Region</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_OTHER_UPD_SS</td>
<td>Basic Detail Update Other Entry</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_REVIEW_SS</td>
<td>Basic Details Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

### Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_BASIC_DETAIL_ACCT_TYPE_SS</td>
<td>Basic Details</td>
<td>Action Type</td>
<td>Dynamic Label</td>
<td>HR_INST_BASIC_DETAILS_TOC</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_EFFECTIVE_DATE</td>
<td>Long Message</td>
<td>HR_TIP_EFFECTIVE_DATE</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>Prefix</td>
<td>Long Message</td>
<td>HR_TIP_PREFIX</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_SUFFIX</td>
<td>Long Message</td>
<td>HR_TIP_SUFFIX</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>Preferred Name</td>
<td>Long Message</td>
<td>HR_TIP_PREFERRED_NAME</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_PREV_LAST_NAME</td>
<td>Long Message</td>
<td>HR_TIP_PREVIOUS_LASTNAME</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_NAME_UPD_SS</td>
<td>Basic Detail Update Name Entry</td>
<td>HR_INSTRUCTION</td>
<td>HR_INST_BASICDETAILS_FORM</td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Flexfield Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_BASIC_DETAIL_</td>
<td>Basic Detail Update</td>
<td>hpsondevfflex</td>
<td>Person Developer</td>
</tr>
<tr>
<td>OTHER_UPD_SS</td>
<td>Other Entry</td>
<td>DF</td>
<td>DF</td>
</tr>
<tr>
<td>HR_BASIC_DETAIL_</td>
<td>Basic Detail Update</td>
<td>Add Per Details</td>
<td>PER_PEOPLE</td>
</tr>
<tr>
<td>OTHER_UPD_SS</td>
<td>Other Entry</td>
<td>Flexfield</td>
<td></td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable
Main Address

The Main Address module stores the employee's primary address.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Main Address V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Main Address Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_MAIN_ADDR_ACT_TYPE_TOP_SS</td>
<td>Main Address Action</td>
</tr>
<tr>
<td>HR_MAIN_ADDR_ACT_TYPE_SS</td>
<td>Main Address Action 1st Level Nested Region</td>
</tr>
<tr>
<td>HR_MAIN_ADDR_TOP_SS</td>
<td>Main Address</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_REVIEW_SS</td>
<td>Main Address Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Employee Demographics 10 – 9
## Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
<td>hraddressseffctdate</td>
<td>Long Message</td>
<td>HR_TIP_MADDR_EFFECTIVE_DATE</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
<td>hraddress-type</td>
<td>Long Message</td>
<td>HR_TIP_MADDR_ADDRESS_TYPE</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
<td>HrAddress-CorrectInst</td>
<td></td>
<td>HR_INST_MAIN_CORRECT_ADDRESS</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
<td>HrAddress-NewChgInst</td>
<td></td>
<td>HR_INST_MAIN_NEW_ADDRESS</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
<td>HrAddress-ViewFutureInst</td>
<td></td>
<td>HR_INST_VIEW_FUTURE_ADDRESS</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_ACT_TYPE_SS</td>
<td>Main Address Action Type</td>
<td>Dynamic Label</td>
<td></td>
<td>HR_INST_MAIN_ADDRESS_TOC</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

### FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_MAIN_ADDRESS_UPDATE_SS</td>
<td>Main Address Update</td>
<td>hraddressflex</td>
<td>PER_ADDRESSES</td>
</tr>
<tr>
<td>HR_MAIN_ADDRESS_REVIEW_SS</td>
<td>Main Address Review</td>
<td>hraddressflex</td>
<td>PER_ADDRESSES</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

### Configurable Profile Options

Not applicable
Secondary Address

The Secondary Address module stores additional addresses for an employee.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Secondary Address V4.0

See: Oracle Workflow Guide (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Other Address Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_SEC_ADDR_ACT_TYPE_TOP_SS</td>
<td>Secondary Address Action</td>
</tr>
<tr>
<td>HR_SECONDARY_ADDR_ACT_TYPE_SS</td>
<td>Secondary Address Action 1st Level</td>
</tr>
<tr>
<td></td>
<td>Nested Region</td>
</tr>
</tbody>
</table>

Employee Demographics 10 – 11
### Region Code

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_SECONDARY_ADDR_TOP_SS</td>
<td>Secondary Address</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_REVIEW_SS</td>
<td>Second Address Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

### Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_SECONDARY_ADDRESS_OVIEW_SS</td>
<td>Secondary Address Overview</td>
<td>HR Instruction</td>
<td></td>
<td>HR_PERINFO_MULTIPLE_ADDRESSES</td>
</tr>
<tr>
<td>HR_SECONDARY_ADDRESS_ACT_TYPE_SS</td>
<td>Secondary Address Action</td>
<td>Dynamic Label</td>
<td></td>
<td>HR_INST_SECONDARY_ADDRESS_TOC</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>hraddressseffctdate</td>
<td>Long Message</td>
<td>HR_TIP_SADDR_EFFECTIVE_DATE</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>hraddressnewchnchg</td>
<td>Long Message</td>
<td>HR_TIP_SADDR_ADDRESS_TYPE</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HrAddressCorrectInst</td>
<td></td>
<td>HR_INST_SCND_CORRECT_ADDRESS</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HrAddressNewChgInst</td>
<td></td>
<td>HR_INST_SCND_NEW_CHG_ADDRESS</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HrAddressViewFuture</td>
<td></td>
<td>HR_INST_VIEW_FUTURE_ADDRESS</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>hraddressflex</td>
<td>Address Structure</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_REVIEW_SS</td>
<td>Second Address Review</td>
<td>hraddressflex</td>
<td>Address Structure</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

**Configurable Profile Options**

Not applicable
Phone Numbers

The Phone Numbers module stores the telephone information for an employee.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Phone Numbers V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Phone Numbers Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PHONE_NUMBERS_TOP_SS</td>
<td>Phone Numbers</td>
</tr>
<tr>
<td>HR_PHONE_NUMBERS_SS</td>
<td>Phone Numbers Update</td>
</tr>
<tr>
<td>HR_PHONE_NUMBERS_REVIEW_SS</td>
<td>Phone Numbers Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4
## Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PHONE_OVIEW_SS</td>
<td>Phone Numbers Overview</td>
<td>HR Instruction</td>
<td></td>
<td>HR_PERINFO_PHONES_ABOVE_LIMIT</td>
</tr>
<tr>
<td>HR_PHONE_NUMBERS_SS</td>
<td>Phone Numbers Update</td>
<td>hpronetext</td>
<td></td>
<td>HR_INST_PHONES_FORM</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HrAddress-NewChgInst</td>
<td></td>
<td>HR_INST_SCND_NEW_CHG_ADDRESS</td>
</tr>
<tr>
<td>HR_SECOND_ADDRESS_UPDATE_SS</td>
<td>Second Address Update</td>
<td>HrAddress-ViewFutuRelInst</td>
<td></td>
<td>HR_INST_VIEW_FUTURE_ADDRESS</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

### FlexFields:

Not applicable

### Configurable Profile Options

Not applicable
Dependents and Beneficiaries

The Dependents and Beneficiaries module stores the names and contact information for an employee’s dependents and beneficiaries.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Dependents and Beneficiaries Main Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
</tr>
<tr>
<td>HR_CONTACT_PHONE_NUMBERS_SS</td>
<td>Contacts Phone Numbers</td>
</tr>
<tr>
<td>HR_CONTACT_ADDRESS_SS</td>
<td>Contact Address</td>
</tr>
<tr>
<td>HR_CONTACTS_ADDLDETAILS_SS</td>
<td>Additional Dependents and Beneficiary Information</td>
</tr>
</tbody>
</table>

Contacts Selection Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_SELECT_TABLE_SS</td>
<td>Contacts Select Overview Region</td>
</tr>
</tbody>
</table>
Tips and Instructions

### Dependents and Beneficiaries Page

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrContactsMainText</td>
<td></td>
<td>HR_289383_CONT_EMRG_MAIN_MSG</td>
</tr>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrSuffix</td>
<td>Tip</td>
<td>HR_TIP_SUFFIX</td>
</tr>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrPrefix</td>
<td>Tip</td>
<td>HR_TIP_PREFIX</td>
</tr>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrDepOrBenContact</td>
<td>Tip</td>
<td>HR_289372_EMRG_CONTACT_FLAG_TIP</td>
</tr>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrPrimaryContact</td>
<td>Tip</td>
<td>HR_289373_PRMRY_REL_MAIN_TIP</td>
</tr>
<tr>
<td>HR_CONTACT_PHONE_NUMBERS</td>
<td>Contact Phone Numbers</td>
<td>HrPhoneText</td>
<td></td>
<td>HR_INT_PHONES_FORM</td>
</tr>
<tr>
<td>HR_CONTACT_ADDRESS_SS</td>
<td>Contact Address</td>
<td>HrAddressText</td>
<td></td>
<td>HR_289343_CONT_ADDR_MAIN_TEXT</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable
Emergency Contacts

The Emergency Contacts module stores the contact information for the employee’s emergency contacts. Employees can add and delete people from the list of emergency contacts as required.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Personal Information V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Contacts V4.0

See: Oracle Workflow Guide (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Emergency Contacts Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
</tr>
<tr>
<td>HR_CONTACT_PHONE_NUMBERS_SS</td>
<td>Phone Numbers</td>
</tr>
</tbody>
</table>
### Contacts Selection Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_SELECT_TABLE_SS</td>
<td>Contacts Select Overview Region</td>
</tr>
</tbody>
</table>

### Emergency Contacts Delete Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_DELETE_TOP_SS</td>
<td>Delete Contact</td>
</tr>
<tr>
<td>HR_CONTACTS_DELETE_SS</td>
<td>End Relationship</td>
</tr>
<tr>
<td>HR_CONTACTS_DELETE_REVIEW_SS</td>
<td>Delete Review</td>
</tr>
</tbody>
</table>

### Emergency Contacts Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_REVIEW_CONTENT_SS</td>
<td>1st Level Nested Region for Contact Review</td>
</tr>
<tr>
<td>HR_CONTACTS_REVIEW_SS</td>
<td>Name and Relationship</td>
</tr>
<tr>
<td>HR_CONTACTS_PHONE_REVIEW_SS</td>
<td>Phone Numbers</td>
</tr>
<tr>
<td>HR_CONTACTS_ADDRESS_REVIEW_SS</td>
<td>Address</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

### Tips and Instructions

### Emergency Contacts Page

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrContactsMain-Text</td>
<td></td>
<td>HR_289383_CONT_EMRG_MAIN_MSG</td>
</tr>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrSuffix</td>
<td>Tip</td>
<td>HR_TIP_SUFFIX</td>
</tr>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrPrefix</td>
<td>Tip</td>
<td>HR_TIP_PREFIX</td>
</tr>
</tbody>
</table>

Employee Demographics 10 – 19
<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrDepOrBenContact</td>
<td>Tip</td>
<td>HR_289371_DEP_BN_F_FLAG_TIP</td>
</tr>
<tr>
<td>HR_CONTACTS_MAIN_SS</td>
<td>Contacts Main Table Region</td>
<td>HrPrimaryContact</td>
<td>Tip</td>
<td>HR_289373_PRMRY_REL_MAIN_TIP</td>
</tr>
<tr>
<td>HR_CONTACT_PHONE_NUMBERS</td>
<td>Contact Phone Numbers</td>
<td>HrPhoneText</td>
<td></td>
<td>HR_INT_PHONES_FORM</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

**FlexFields:**

Not applicable

**Configurable Profile Options**

Not applicable
Professional Details Modules

There are five modules within Professional Details: Competence Profiles, Education and Qualifications, Other Professional Awards, Work Preferences, and Resume. In addition, there are two modules for the US localization (Tenure Tracking and Academic Rank). Employees can maintain their own details or managers can maintain the details for their direct reports.
**Education and Qualifications**

This module allows users to add qualifications to an existing list of qualifications or to create a new list of qualifications. The user can also add, edit, and delete the major subjects for the qualifications. When the user has created or edited a qualification, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

The Education and Qualifications overview page shows the list of approved education qualifications for a person and also those qualifications that are pending approval.

**Menu and Function Names**

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Education and Qualifications Mgr V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Education and Qualifications V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

**Workflow**

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Education and Qualifications V4.0

See: *Oracle Workflow Guide* (available on Metalink)

**Configurable Workflow Attributes:**

Not applicable

**Configurable Web Applications Dictionary Regions:**

The following definitions can be configured in the Configuration Framework:
### Qualification Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_QUA_ADD_SUBJECT_TOP_SS</td>
<td>Add Subject</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_SS</td>
<td>Add Subject</td>
</tr>
<tr>
<td>HR_QUA_ADD_TOP_SS</td>
<td>Add Qualifications</td>
</tr>
<tr>
<td>HR_QUA_ADD_MAIN_PAGE_SS</td>
<td>Qualification Add Main Page</td>
</tr>
<tr>
<td>HR_QUA_ADD_QUALIFICATION_SS</td>
<td>Qualification Add Qualification</td>
</tr>
<tr>
<td>HR_QUA_ADD_SCHOOL_SS</td>
<td>Add Qualification Add School</td>
</tr>
<tr>
<td>HR_QUA_ADD_AWARD_SS</td>
<td>Qualification Add Award</td>
</tr>
<tr>
<td>HR_QUA_ADD_COMMENT_SS</td>
<td>Qualification Add Comments</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_NESTED_SS</td>
<td>Qualification Add Subject Nested Main</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_TABLE_SS</td>
<td>Qualification Add Subject Table</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUB_MAIN_PAGE_SS</td>
<td>Qualification Add Subject Main Page</td>
</tr>
<tr>
<td>HR_QUA_ADD_TRAINING_SS</td>
<td>Qualification Add Training</td>
</tr>
<tr>
<td>HR_QUA_ADD_TUITION_SS</td>
<td>Qualification Add Tuition</td>
</tr>
<tr>
<td>HR_QUA_NAVIGATION_BAR_SS</td>
<td>Qualification Navigation Bar</td>
</tr>
<tr>
<td>HR_QUA_OVERVIEW_APP_SS</td>
<td>Qualification Approved Table</td>
</tr>
<tr>
<td>HR_QUA_OVERVIEW_MAIN_PAGE_SS</td>
<td>Qualification Overview Page</td>
</tr>
<tr>
<td>HR_QUA_OVERVIEW_PEN_SS</td>
<td>Qualification Pending Approval Table</td>
</tr>
<tr>
<td>HR_QUA_OVERVIEW_PEN_SUB_SS</td>
<td>Qualification Pending Approval Header</td>
</tr>
<tr>
<td>HR_QUA_OVERVIEW_SUB_SS</td>
<td>Qualification Approved Header</td>
</tr>
<tr>
<td>HR_QUA_OVERVIEW_TOP_SS</td>
<td>Education and Qualifications Overview</td>
</tr>
<tr>
<td>HR_QUA_SUB_NAVIGATION_BAR_SS</td>
<td>Subject Navigation Bar</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4
## Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_QUA_OVERVIEW_SUB_SS</td>
<td>Qualification Approved Header</td>
<td>HrAddQua</td>
<td></td>
<td>HR_INST_NO_QUALIFICATION</td>
</tr>
<tr>
<td>HR_QUA_OVERVIEW_MAIN_PAGE_SS</td>
<td>Qualification Overview Page</td>
<td>HrQuaOverviewInfo</td>
<td></td>
<td>HR_INST_ADD_OVERVIEW_INFO</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_NESTED_SS</td>
<td>Qualification Add Subject Nested</td>
<td>HrQuaAddSubjectText</td>
<td></td>
<td>HR_INST_QUA_SUBJECT</td>
</tr>
<tr>
<td>HR_QUA_ADD_MAIN_PAGE_SS</td>
<td>Qualification Add Main Page</td>
<td>HrQuaAddMainPage</td>
<td></td>
<td>HR_INST_ADD_MAIN_PAGE_INFO</td>
</tr>
<tr>
<td>HR_QUA_ADD_MAIN_PAGE_SS</td>
<td>Qualification Add Main Page</td>
<td>HrQuaEditMainPage</td>
<td></td>
<td>HR_INST_EDIT_MAIN_PAGE_INFO</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_MAIN_PAGE_SS</td>
<td>Qualification Add Subject Main Page</td>
<td>HrQuaAddSubjectMainPage</td>
<td></td>
<td>HR_INST_ADD_SUBJECT</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_MAIN_PAGE_SS</td>
<td>Qualification Add Subject Main Page</td>
<td>HrQuaEditSubjectMainPage</td>
<td></td>
<td>HR_INST_EDIT_SUBJECT</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_MAIN_PAGE_SS</td>
<td>Qualification Add Subject Main Page</td>
<td>HrQuaAddSubjectMainPage</td>
<td></td>
<td>HR_INST_ADD_SUBJECT</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_MAIN_PAGE_SS</td>
<td>Qualification Add Subject Main Page</td>
<td>HrQuaEditSubjectMainPage</td>
<td></td>
<td>HR_INST_EDIT_SUBJECT</td>
</tr>
<tr>
<td>HR_QUA_ADD_SUBJECT_MAIN_PAGE_SS</td>
<td>Qualification Add Subject Main Page</td>
<td>HrQuaOverviewInfo</td>
<td></td>
<td>HR_INST_ADD_SUBJECT</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

**FlexFields:**

Not applicable

**Configurable Profile Options**

Not applicable
Other Professional Awards

This module allows users to add additional professional awards to an existing list of awards or to create a new list of professional awards. Academic awards are entered in the Education and Qualifications page. When the user has created or edited an award, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Other Professional Awards Mgr V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Other Professional Awards V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

- Other Professional Awards V4.0
  
  See: Oracle Workflow Guide (available on Metalink)

Configurable Workflow Attributes:

- Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

**Regions**

**Awards Review Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_AWARD_ADD_TOP_SS</td>
<td>Awards</td>
</tr>
<tr>
<td>HR_AWARD_ADD_MAIN_PAGE_SS</td>
<td>Awards Add Main Page</td>
</tr>
</tbody>
</table>
### Awards Add Award Information

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_AWARD_ADD_AWARD_SS</td>
<td>Awards Add Award</td>
</tr>
<tr>
<td>HR_AWARD_ADD_COMMENTS_SS</td>
<td>Award Add Comments</td>
</tr>
<tr>
<td>HR_AWARD_ADD_LICENSE_SS</td>
<td>Awards Add License Info</td>
</tr>
<tr>
<td>HR_AWARD_ADD_QUALIFICATION_SS</td>
<td>Awards Add Qualification</td>
</tr>
<tr>
<td>HR_AWARD_ADD_SUBJECT_NESTED_SS</td>
<td>Awards Add Subjects Nested</td>
</tr>
<tr>
<td>HR_AWARD_ADD_SUBJECT_TABLE_SS</td>
<td>Awards Add Subject Table</td>
</tr>
<tr>
<td>HR_AWARD_ADD_TRAINING_SS</td>
<td>Awards Add Training</td>
</tr>
<tr>
<td>HR_AWARD_ADD_TUITION_SS</td>
<td>Awards Add Tuition</td>
</tr>
<tr>
<td>HR_AWARD_NAVIGATION_BAR_SS</td>
<td>Award Navigation Bar</td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_APP_SS</td>
<td>Award Approved Table</td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_MAIN_PAGE_SS</td>
<td>Award Overview Page</td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_PEN_SS</td>
<td>Award Pending Approval Table</td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_PEN_SUB_SS</td>
<td>Award Pending Approval Header</td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_SUB_SS</td>
<td>Award Approved Header</td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_TOP_SS</td>
<td>Other Professional Awards Overview</td>
</tr>
</tbody>
</table>

### Awards Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_AWARDS_REVIEW_SS</td>
<td>Awards Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4
## Employee Demographics

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_AWARD_ADD_SUBJECT_NESTED_SS</td>
<td>Awards Add Subjects Nested</td>
<td>HrQuaAddSubjectText</td>
<td>HR_INST_AWARD_SUBJECT</td>
<td></td>
</tr>
<tr>
<td>HR_AWARD_ADD_MAIN_PAGE_SS</td>
<td>Awards Add Main Page</td>
<td>HrQuaAddInfoText</td>
<td>HR_INST_NEW_AWARD</td>
<td></td>
</tr>
<tr>
<td>HR_AWARD_ADD_MAIN_PAGE_SS</td>
<td>Awards Add Main Page</td>
<td>HrQuaEditInfoText</td>
<td>HR_INST_EDIT_AWARD</td>
<td></td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_SUB_SS</td>
<td>Award Approved Header</td>
<td>HrAddQua</td>
<td>HR_INST_NO_AWARD_FOUND</td>
<td></td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_SUB_SS</td>
<td>Award Approved Header</td>
<td>HrAddQuaFound</td>
<td>HR_INST_AWARD_FOUND</td>
<td></td>
</tr>
<tr>
<td>HR_AWARD_OVERVIEW_MAIN_PAGE_SSS</td>
<td>Award Overview Page</td>
<td>HrQuaOverviewPageInfo</td>
<td>HR_INST_ADD_AWARD</td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

### FlexFields:

Not applicable

### Configurable Profile Options

Not applicable
The Competence Profile enables the user to record a set of competences for an individual. Competences include knowledge, skills, and personal or professional attributes. Access to the competencies function may be restricted to specific users, for example, the line manager. There is the need for a security mechanism to define who can maintain competences for which employees.

The Competence Profile Overview page has three sections:

• Current competencies
• Current session changes
• Competences pending approval

In the Competence Profile Overview page, you can:

• View the Competence Profile History
• Add additional competences
• Update competence levels
• Correct existing competences
• Correct or delete session changes

In the Add Competence page, you can:

• Search for competences to add to your profile
• Create default profiles
• Add additional information on competences

In the New Levels Attained page, you can

• Enter information on the competence level attained

All pages allow you to validate the changes made.

A person’s competencies are only valid in the context of the proficiency level at which they demonstrate each competence. A competence definition associated with a competence profile typically ‘ends’ when a new level of the competence is attained. Typically, a person may have a continuous series of records for a given competence showing progression from one level to the next. The levels for a given competence can fluctuate over time. A given competence can also become obsolete within a person’s competence profile.

Proficiency scales can vary with each competence so it is essential that the user has access to the descriptions for the competence, its associated levels, and its behavioral indicators wherever a competence and scale is displayed. The proficiency levels must be displayed dynamically depending on the selected competence.
The user can copy the competences defined for the job or position related to a person’s assignment across to their competence profile using the Default Competences button in the Add Competence page. However, the user must update the proficiency level manually as this is not copied across.

**Menu and Function Names**

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Competence Profile Mgr V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Competence Profile V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

**Workflow**

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Competence Profile V4.0

See: *Oracle Workflow Guide* (available on Metalink)

**Configurable Workflow Attributes:**

Not applicable

**Configurable Web Applications Dictionary Regions:**

The following definitions can be configured in the Configuration Framework:

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_COMP_OVERVIEW_TOP_SS</td>
<td>Competences Overview</td>
</tr>
</tbody>
</table>

Employee Demographics 10 – 29
### Competence History and Details Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_COMP_HISTORY_TOP_SS</td>
<td>Expired Competences</td>
</tr>
<tr>
<td>HR_COMP_HISTORY_MAIN_PAGE_SS</td>
<td>Expired Competences Main Page Region</td>
</tr>
<tr>
<td>HR_COMP_HIST_DET_TOP_SS</td>
<td>Competence History Details</td>
</tr>
<tr>
<td>HR_COMP_HIST_DET_MAIN_PAGE_SS</td>
<td>Competence History Details Main Page</td>
</tr>
</tbody>
</table>

### Competence Correction Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_COMP_CORRECT_TOP_SS</td>
<td>Correction</td>
</tr>
<tr>
<td>HR_COMP_CORRECT_MAIN_PAGE_SS</td>
<td>Correction Main Page</td>
</tr>
</tbody>
</table>

### Add Competence and Details Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_ADD_DETAIL_TOP_SS</td>
<td>Add Competence Details</td>
</tr>
<tr>
<td>HR_ADD_DETAIL_MAIN_SS</td>
<td>Add Detail Main Page</td>
</tr>
<tr>
<td>HR_COMP_ADD_TOP_SS</td>
<td>Add Competences</td>
</tr>
<tr>
<td>HR_COMP_ADD_MAIN1_SS</td>
<td>Addition Main Page</td>
</tr>
</tbody>
</table>

### Update Competence and Details Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_COMP_UPDATE_TOP_SS</td>
<td>Update</td>
</tr>
<tr>
<td>HR_COMP_UPDATE_MAIN1_SS</td>
<td>Update Main Page</td>
</tr>
<tr>
<td>HR_UPDATE_DETAIL_TOP_SS</td>
<td>Update Detail</td>
</tr>
<tr>
<td>HR_UPDATE_DETAIL_MAIN_SS</td>
<td>Update Detail Main Page</td>
</tr>
</tbody>
</table>
Correct Current Session Changes

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_COMP_CURRENT_CHANGES_TOP_SS</td>
<td>Current Changes</td>
</tr>
<tr>
<td>HR_COMP_CURRENT_CHANGES_SS</td>
<td>Current Changes Main Page</td>
</tr>
</tbody>
</table>

Competence Review and Details Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_COMP_REVIEW_SS</td>
<td>Competence Profile</td>
</tr>
<tr>
<td>HR_REVIEWDETAILS_TOP_SS</td>
<td>Review Details</td>
</tr>
<tr>
<td>HR_REVIEWDETAILS_MAIN_SS</td>
<td>Review Details Main Page</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_COMP_CORRECT_MAIN_PAGE_SS</td>
<td>Correction Main Page</td>
<td>Correction Header</td>
<td></td>
<td>HR_COMP_CORRECTION_SS</td>
</tr>
<tr>
<td>HR_COMP_CURRENT_CHANGES_SS</td>
<td>Current Changes Main Page</td>
<td>Correction Header</td>
<td></td>
<td>HR_COMP_CORRECTION_SS</td>
</tr>
</tbody>
</table>

See: Adding Instructions to a Web Page: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable
Work Preferences

The Work Preferences function enables users to store information about their preferred work location and their relocation and travel preferences. Employees can enter the information for themselves and managers can enter the information for their direct reports.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Work Preferences Mgr V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Work Preferences V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WORK_PREFERENCE_TOP_SS</td>
<td>Work Preferences</td>
</tr>
<tr>
<td>HR_WORK_PREFERENCE_SS</td>
<td>Work Preferences</td>
</tr>
</tbody>
</table>
### Employee Demographics

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WP_DOMESTIC_OPTIONS_SS</td>
<td>Domestic Options</td>
</tr>
<tr>
<td>HR_WP_INTERNATIONAL_OPTIONS_SS</td>
<td>International Relocation Options</td>
</tr>
<tr>
<td>HR_NAVIGATION_BAR_SS</td>
<td>Work Preference Navigation Bar</td>
</tr>
</tbody>
</table>

#### Work Preferences Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WP_REVIEW_SS</td>
<td>Work Preference Review Page</td>
</tr>
<tr>
<td>HR_WP_DOMESTIC_REVIEW_SS</td>
<td>Domestic Options Review</td>
</tr>
<tr>
<td>HR_WP_INTERNATIONAL_REVIEW_SS</td>
<td>International Relocation Options Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

#### Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WORK_PREFERENCES_SS</td>
<td>Work Preferences</td>
<td>Hrinstruction</td>
<td></td>
<td>HR_INST_WORK_PREFERENCES</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

#### FlexFields:

Not applicable

#### Configurable Profile Options

Not applicable
Resume

The Resume module enables an employee to store and update their own resume. A manager can store a resume for an employee or update the resume with new information.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service V4.0</td>
<td>Resume Mgr V4.0</td>
</tr>
<tr>
<td>Employee Self Service V4.0</td>
<td>Resume V4.0</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Resume Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_RESUME_TOP_SS</td>
<td>Resume</td>
</tr>
<tr>
<td>HR_RESUME_SS</td>
<td>Resume</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4
Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_RESUME_SS</td>
<td>Resume</td>
<td>HrInstruction</td>
<td></td>
<td>HR_INST_TEXT_RESUME</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable
Tenure Tracking (US)

Tenure is a unique term in the “Education Industry” that means the completion of professional criteria and an extended probationary period. This results in a person attaining permanent employment with the institution. The Tenure Status module captures the following information:

- Tenure status
- Date determined
- Projected tenure date
- Adjusted tenure date
- Reason for adjustment
- Subject to tenure quota?

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Professional Details V4.0</td>
<td>Tenure Status Mgr V4.0</td>
</tr>
<tr>
<td>Professional Details V4.0</td>
<td>Tenure Status Overview</td>
</tr>
</tbody>
</table>

See: Defining Menus for SSHR: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Tenure Status V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the OA Configuration Framework:
Regions

Tenure Status Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_TENURE_STATUS_TOP</td>
<td>Tenure Status Top</td>
</tr>
<tr>
<td>PQH_TENURE_STATUS</td>
<td>Tenure Status</td>
</tr>
<tr>
<td>PQH_TENURE_STATUS_OVERVIEW_TOP</td>
<td>Tenure Status Overview Top</td>
</tr>
<tr>
<td>PQH_TENURE_STATUS_FLEX</td>
<td>Tenure Status Flex</td>
</tr>
</tbody>
</table>

Tenure Status Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_TENURE_STATUS_REVIEW</td>
<td>Tenure Status Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_TENURE_STATUS_FLEX</td>
<td>Tenure Status Flex</td>
<td>Descriptive Flexfield</td>
<td>Extra Person Info DDF</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable
Academic Rank (US)

The Academic Rank module is a method for promotional progression within Higher Education. The Academic Rank module captures the following information:

- Academic rank
- Start date and end date
- Next academic rank
- Projected date

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Professional Details V4.0</td>
<td>Academic Rank Mgr</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Academic Rank V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_ACADEMIC_RANK_TOP</td>
<td>Academic Rank Top</td>
</tr>
<tr>
<td>PQH_ACADEMIC_RANK</td>
<td>Academic Rank</td>
</tr>
</tbody>
</table>
### Employee Demographics

#### Academic Rank Overview Top

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_ACADEMIC_RANK_OVRVW_TOP</td>
<td>Academic Rank Overview Top</td>
</tr>
</tbody>
</table>

#### Academic Rank Flex

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_ACADEMIC_RANK_FLEX</td>
<td>Academic Rank Flex</td>
</tr>
</tbody>
</table>

#### Academic Rank Review

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_ACADEMIC_RANK_REVIEW</td>
<td>Academic Rank Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

#### Tips and Instructions

Not applicable

#### FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQH_ACADEMIC_RANK_FLEX</td>
<td>Academic Rank</td>
<td>Descriptive Flex-field</td>
<td>Extra Person Info DDF</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

#### Configurable Profile Options

Not applicable
CHAPTER 11

Manage Employee Events Functions
MEE Functions and Workflow

The Manage Employee Events module groups together workflow processes that relate to changes in an employee’s assignment. You can build and configure these workflow processes to suit the requirements of your enterprise. The basic MEE functions are: Assignment, Location, Work Schedule, Change Manager, Termination, Pay Rate, Individual Compensation Distributions, Special Information Types, and Other Employment Information.

Chained MEE Processes

Oracle Workflow enables you to combine different MEE functions into one workflow process. Such processes are known as chained processes. SSHR includes the following predefined chained processes which appear as functions on the user menus:

- Change Cost Center, Location, Manager V4.0
- Change Manager

Note: You can also include the Benefits function Individual Compensation Distributions (ICD) in chained processes, if required.

Ordering MEE Workflow Processes

The order of workflow processes must be carefully designed to ensure business rules are maintained and implemented. If you choose to create your own chained processes and functionality, you must consider the following rules when designing the sequence of functions:

<table>
<thead>
<tr>
<th>Function</th>
<th>Restriction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment</td>
<td>If the Assignment module is present in a chained process, it must appear first.</td>
</tr>
<tr>
<td>Location</td>
<td></td>
</tr>
<tr>
<td>Individual Compensation Distributions</td>
<td>Can appear anywhere in the chain</td>
</tr>
<tr>
<td>Other Employment Information</td>
<td>Can appear anywhere in the chain</td>
</tr>
<tr>
<td>Pay Rate</td>
<td>Can appear anywhere in the chain</td>
</tr>
<tr>
<td>Special Information Types</td>
<td>Can appear anywhere in the chain</td>
</tr>
<tr>
<td>Change Manager</td>
<td>If used in a chain with Termination, it should follow Termination</td>
</tr>
<tr>
<td>Termination</td>
<td>If used in a chain with Supervisor, it should precede Supervisor</td>
</tr>
</tbody>
</table>

11 – 2 Implementing Oracle Self-Service Human Resources 4.0
You can configure your own processes in any number of ways but they must be in the sequence outlined above. For example, you could configure a process that follows this sequence:

- Step 1: Assignment
- Step 2: Location
- Step 5: Work Schedule

But, you cannot configure a process in this order, as you will break business rules:

- Step 2: Location
- Step 1: Assignment
- Step 5: Work Schedule

As long as you maintain the order of steps you can configure whichever workflow processes your enterprise needs.
**Assignment**

The Assignment module is used in some delivered Manage Employee Events (MEE) menu functions, for example, the Employee Status Change chained process. It can be added in any of your own business processes that you model in the Workflow Builder.

**Menu and Function Names**

Not applicable

**Workflow**

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Deploy Person V4.0

**Configurable Workflow Attributes:**

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment V4.0</td>
<td>Use Grade Points</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Set Grade Ceiling</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Use Step/Grade No Update</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Display Job Attachment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Display Position Attachment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>HR Element Warning</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Asg Change Reason Look-up Codes</td>
<td></td>
</tr>
</tbody>
</table>

See: Configuring Workflow Attribute Values: page 6 – 7

**User Grade Points**

Defines whether the ceiling point can be displayed.

**Set Grade Ceiling**

Defines whether the ceiling point can be updated.

**Use Step/Grade No Update**

Defines whether the grade can be changed if spinal points exist.
HR Element Warning
Controls whether the hr element warning is displayed.

Asg Change Reason Lookup Codes
Allows system administrator to specify which change reason lookup codes should be displayed (subset of change reason lookup codes).

Display Job Attachment
Whether attachments are displayed for the job.

Display Position Attachment
Whether attachments are displayed for the position.

Configurable Web Applications Dictionary Regions:
The following definitions can be configured in the Configuration Framework:

Regions

Assignment Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_ASSIGNMENT_TOP_SS</td>
<td>Assignment</td>
</tr>
<tr>
<td>HR_ASSIGNMENT_SS</td>
<td>Assignment</td>
</tr>
<tr>
<td>HR_ASSIGNMENT_STATUS_SS</td>
<td>Assignment Status</td>
</tr>
<tr>
<td>HR_ORGANIZATION_SS</td>
<td>Department</td>
</tr>
<tr>
<td>HR_JOB_SS</td>
<td>Job</td>
</tr>
<tr>
<td>HR_POSITION_SS</td>
<td>Position</td>
</tr>
<tr>
<td>HRGRADE_SS</td>
<td>Grade</td>
</tr>
<tr>
<td>HR_PEOPLE_GROUP_SS</td>
<td>People Group</td>
</tr>
<tr>
<td>HR_OTHER_ASSIGNMENT_SS</td>
<td>Other Assignment Information</td>
</tr>
</tbody>
</table>

Assignment Display Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_ORGANIZATION_DETAILS_TOP_SS</td>
<td>Department Details</td>
</tr>
<tr>
<td>HR_ORGANIZATION_DETAILS_SS</td>
<td>Department Details</td>
</tr>
<tr>
<td>Region Code</td>
<td>Region Name</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>HR_ORGDETAILS_MORE_INFO_SS</td>
<td>More Department Information</td>
</tr>
<tr>
<td>HR_ORGDETAILS_WORK_DAY_SS</td>
<td>Department Working Conditions</td>
</tr>
<tr>
<td>HR_JOB_SS</td>
<td>Job</td>
</tr>
<tr>
<td>HR_POSITION_SS</td>
<td>Position</td>
</tr>
<tr>
<td>HR_GRADE_SS</td>
<td>Grade</td>
</tr>
<tr>
<td>HR_PEOPLE_GROUP_SS</td>
<td>People Group</td>
</tr>
<tr>
<td>HR_OTHER_ASSIGNMENT_SS</td>
<td>Other Assignment Information</td>
</tr>
<tr>
<td>HR_JOBDETAILS_TOP_SS</td>
<td>Job Details</td>
</tr>
<tr>
<td>HR_JOBDETAILS_SS</td>
<td>Job Details</td>
</tr>
<tr>
<td>HR_JOBDETAILS_MORE_INFO_SS</td>
<td>More Job Information</td>
</tr>
<tr>
<td>HR_JOBDETAILS_SPECIFIC_SS</td>
<td>Specific Job Information</td>
</tr>
<tr>
<td>HR_JOB_VALID_GRADE_SS</td>
<td>Job Valid Grades</td>
</tr>
<tr>
<td>HR_JOB_VALID_GRADE_TABLE_SS</td>
<td>Job Valid Grades Table</td>
</tr>
<tr>
<td>HR_POSITIONDETAILS_TOP_SS</td>
<td>Position Details</td>
</tr>
<tr>
<td>HR_POSITIONDETAILS_SS</td>
<td>Position Details</td>
</tr>
<tr>
<td>HR_POSITION_EXTRA_INFO</td>
<td>Extra Position Information</td>
</tr>
<tr>
<td>HR_POSDETAILS_MORE_INFO_SS</td>
<td>More Position Information</td>
</tr>
<tr>
<td>HR_POSITION_VALID_GRADE_SS</td>
<td>Position Valid Grades</td>
</tr>
<tr>
<td>HR_POS_VALID_GRADE_TABLE_SS</td>
<td>Position Valid Grades Table</td>
</tr>
<tr>
<td>HR_GRADEDETAILS_TOP_SS</td>
<td>Grade Details</td>
</tr>
<tr>
<td>HR_GRADEDETAILS_SS</td>
<td>Grade Details</td>
</tr>
<tr>
<td>HR_GRADEDETAILS_MORE_INFO_SS</td>
<td>More Grade Information</td>
</tr>
<tr>
<td>HR_GRADE_STEPS_SS</td>
<td>Grade Steps</td>
</tr>
<tr>
<td>HR_GRADE_STEPS_TABLE_SS</td>
<td>Grade Steps Table</td>
</tr>
</tbody>
</table>
Assignment Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_ASG_REVIEW_SS</td>
<td>Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_JOB_DETAILS_SPECIFIC_SS</td>
<td>Specific Job Information</td>
<td>HrFlex1</td>
<td>Job Developer DF</td>
</tr>
<tr>
<td>HR_POSITION_EXTRA_INFO_SS</td>
<td>Extra Position Information</td>
<td>HrFlex1</td>
<td>Extra Position Info DDF</td>
</tr>
<tr>
<td>HR_ORG_DETAILS_WORK_DAY_SS</td>
<td>Department Working Conditions</td>
<td>HrFlex1</td>
<td>Org Developer DF</td>
</tr>
<tr>
<td>HR_PEOPLE_GROUP_SS</td>
<td>People Group</td>
<td>People Group Key Flex</td>
<td>GRP</td>
</tr>
<tr>
<td>HR_OTHER_ASSIGNMENT_SS</td>
<td>Other Assignment Information</td>
<td>Assignment Flex</td>
<td>PER_ASSIGNMENTS</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable
Termination

The Termination page enables a manager to end an employee’s employment relationship. For this reason, the Termination function is not available in the Employee Self Service menu. If the terminated employee has direct subordinates, the system will automatically display the Change Supervisor page to reassign the terminated supervisor’s subordinates to another supervisor. You can configure which Termination Reasons are displayed to the user in the Termination page. You configure the reasons in the workflow activity attribute configuration. For example, if your enterprise does not want a manager to select the Termination Reason lookup code of “Involuntary Termination”, you can exclude it by omitting this lookup code in workflow.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:
Termination Process V4.0

Configurable Workflow Attributes:

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Termination Process V4.0</td>
<td>Termination Page V4.0</td>
<td>Termination Reason Look-up Codes</td>
</tr>
</tbody>
</table>

Termination Reason Lookup Codes

This attribute allows users to configure which Termination Reason lookup Codes to display.

**Note:** The list entered in this attribute is in the format of “lookup_code1 | lookup_code2 | ...”. The Lookup Code, not the meaning, is used and no embedded blanks are allowed. Separate each lookup code with the “|”.

The list entered in this attribute is the inclusion list, in other words, the codes entered here will be included for display. If all the lookup codes
are to be displayed, you can either leave this attribute empty, or enter "All" or "ALL".

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

**Termination – Update Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_TERMINATION_TOP_SS</td>
<td>Termination</td>
</tr>
<tr>
<td>HR_TERMINATION_DETAIL_SS</td>
<td>Termination Details</td>
</tr>
</tbody>
</table>

**Termination – Review Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_TERMINATION_REVIEW_SS</td>
<td>Termination Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_TERMINATION_DETAIL_SS</td>
<td>Termination Details</td>
<td>HR Instruction</td>
<td>Long Message</td>
<td>HR_INST_TERMINATION</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_TERMINATION_DETAIL_SS</td>
<td>Termination Details</td>
<td>HR Persion of Service Flex</td>
<td>PER_PERIODS_OF_SERVICE</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable
Work Schedule

The Work Schedule workflow process enables a manager to change an employee’s work schedule and employment category. A work schedule is the number of days and hours worked and the start and end times for the employee. The employment category defines the type of employment, for example, full and part-time employment.

Note: Part of the Work Schedule page information is displayed from the Soft Coded Key Flexfield.

See Configuring Flexfields: page 7 – 5

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Work Schedule V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Work Schedule – Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WORK_SCHED_TOP_SS</td>
<td>Work Schedule Page</td>
</tr>
<tr>
<td>HR_WORK_SCHED_REC_SS</td>
<td>Work Schedule</td>
</tr>
<tr>
<td>HR_EMPLOYMENT_TYPE_SS</td>
<td>Employment Type</td>
</tr>
</tbody>
</table>

Work Schedule – Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WORK_SCHED_REVIEW_SS</td>
<td>Work Schedule Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4
Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WORK_SCHED_</td>
<td>Work Schedule</td>
<td>HR Instruction</td>
<td>Long Message</td>
<td>HR_INST_WORK_S</td>
</tr>
<tr>
<td>REC_SS</td>
<td></td>
<td></td>
<td></td>
<td>CHED_MAIN</td>
</tr>
<tr>
<td>HR_WORK_SCHED_</td>
<td>Work Schedule</td>
<td>HR_NOR-</td>
<td>Short Tip</td>
<td>HR_TIP_WORK_ST</td>
</tr>
<tr>
<td>REC_SS</td>
<td></td>
<td>MAL_START_TIME</td>
<td></td>
<td>ART_TIME</td>
</tr>
<tr>
<td>HR_WORK_SCHED_</td>
<td>Work Schedule</td>
<td>HR_NOR-</td>
<td>Short Tip</td>
<td>HR_TIP_WORK_END_TIME</td>
</tr>
<tr>
<td>REC_SS</td>
<td></td>
<td>MAL_END_TIME</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_WORK_SCHED_</td>
<td>Work Schedule</td>
<td>Work Sched Key</td>
<td>SCL</td>
</tr>
<tr>
<td>REC_SS</td>
<td></td>
<td>Flex</td>
<td></td>
</tr>
<tr>
<td>HR_WORK_SCHED_</td>
<td>Work Schedule</td>
<td>Work Sched Desc</td>
<td>PER_ASSIGNMENTS</td>
</tr>
<tr>
<td>REC_SS</td>
<td></td>
<td>Flex</td>
<td></td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable
Change Location

The Change Location function enables a manager to change an employee’s work location.

The Change Location Function is available under the predefined Manager responsibility. If required, you can set up approvals processes for the Change Location function.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Location V4.0

Configurable Workflow Attributes:

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location V4.0</td>
<td>Location V4.0</td>
<td>Hr Null Allowed</td>
</tr>
<tr>
<td>Location V4.0</td>
<td>Location V4.0</td>
<td>HR Location Required</td>
</tr>
<tr>
<td>Location V4.0</td>
<td>Location V4.0</td>
<td>Hr Use Defaults</td>
</tr>
<tr>
<td>Location V4.0</td>
<td>Location V4.0</td>
<td>Hr Override Defaults</td>
</tr>
<tr>
<td>Location V4.0</td>
<td>Location V4.0</td>
<td>HR Element Warning</td>
</tr>
</tbody>
</table>

HR Null Allowed:

Allows null location for an employee.

HR Location Required:

Defines whether the location is required for an employee.

HR Use Defaults:

The location can be changed to the default locations which are the user’s Organization Location or Position Location. This is enforced by displaying the locations in a poplist.

HR Override Defaults:
The location can be changed to any global location or any location in the user’s business group. The locations are displayed in a list of values if this attribute is called.

**HR Element Warning:**

Defines whether or not to display the HR element warning.

See: Configuring Workflow Attribute Values: page 6 – 7

**Configurable Web Applications Dictionary Regions:**

The following definitions can be configured in the Configuration Framework:

**Regions**

**Location Update Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CHANGE_LOCATION_TOP_SS</td>
<td>Location</td>
</tr>
<tr>
<td>HR_CHANGE_LOCATION_SS</td>
<td>Change Location</td>
</tr>
<tr>
<td>HR_LOCATION_SS</td>
<td>Location</td>
</tr>
<tr>
<td>HR_CHANGE_LOCATION_LOV_SS</td>
<td>Location LOV</td>
</tr>
</tbody>
</table>

**Location Review Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CHANGE_LOCATION_REVIEW_SS</td>
<td>Change Location Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

**Tips and Instructions**

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CHANGE_LOCATION_SS</td>
<td>Change Location</td>
<td>HrInstruction</td>
<td>Long Message</td>
<td>HR_INST_CHANGE_LOCATION</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9
FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_LOCATION_SS</td>
<td>Location</td>
<td>Location Address</td>
<td>Address Location</td>
</tr>
<tr>
<td>HR_LOCATION_SS</td>
<td>Location</td>
<td>Assignment Flex-field</td>
<td>PER_ASSIGNMENTS</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable
Special Information Types (SITs)

Special Information Types (SITs) enable you to store additional information that is not currently captured by the system. The additional information is stored in categories. You can store additional information about jobs, positions, skills, and people. There are also two US-specific categories of information: OSHS and ADA.

The SITs are stored in the Personal Analysis Flexfield flexfield structure. The categories are stored in the PER_SPECIAL_INFORMATION_TYPE_USAGES table.

SITs are dated but not date-tracked. This means that the start and end date fields are included in the user interface.

SITs can have multiple records for each type. For example, a SKILL SIT for Employment Qualifications would usually contain many records.

Each type of information within a category (for example, the ADA disability information within the ADA category) becomes the region header. You can then add additional region items and buttons, for example, Add Another Row.

To enable the SIT to be accessible from the person forms using a taskflow, they must have the category type 'OTHER'. This ensures that the SIT has the key flex form items and calls to maintain the data in the PER_ANALYSIS_CRITERIA table (holds the key flex combination) and the PER_PERSON_ANALYSES table (holds the employee records).

SSHR currently only supports SITs with the category 'OTHER'.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Special Information Types V4.0

Configurable Workflow Attributes:

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Initial Save for Later</td>
<td>HR_TRANSACTION_SS.SET_INITIAL_SAVE_FOR_LATER</td>
<td></td>
</tr>
<tr>
<td>SIT V4.0</td>
<td>WF_STANDARD.BLOCK</td>
<td></td>
</tr>
</tbody>
</table>

11 – 16 Implementing Oracle Self-Service Human Resources 4.0
### Manage Employee Events Functions

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIT Update V4.0</td>
<td>WF_STANDARD.BLOCK</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Removes a transaction</td>
<td>HR_TRANSACTION_WEB_ROLL-BACK_TRANSACTION</td>
</tr>
<tr>
<td></td>
<td>Review Page V4.0</td>
<td>HR_WORKFLOW_SERVICE.BLOCK</td>
</tr>
<tr>
<td></td>
<td>Confirmation Page V4.0</td>
<td>HR_WORKFLOWSERVICE.BLOCK</td>
</tr>
<tr>
<td></td>
<td>Cancel Activity V4.0</td>
<td>HR_WORKFLOW_SERVICE.BLOCK</td>
</tr>
<tr>
<td></td>
<td>Back Activity Page JSP</td>
<td>HR_WORKFLOW_SERVICE.BLOCK</td>
</tr>
</tbody>
</table>

See: Configuring Workflow Attribute Values: page 6 – 7

### Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

#### Regions

#### Special Information Types Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSON_SIT_TOP_SS</td>
<td>Special Personal Information Page</td>
</tr>
<tr>
<td>HR_PERSON_SIT_MAIN_SS</td>
<td>Special Information Type Page</td>
</tr>
<tr>
<td>HR_PERSON_SIT_DETAILS_SS</td>
<td>Special Person Information Type Details</td>
</tr>
</tbody>
</table>

#### SIT Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSON_SIT_UPDATE_TOP_SS</td>
<td>Special Information Type Update Top Page</td>
</tr>
<tr>
<td>HR_PERSON_SIT_UPDATE_SS</td>
<td>Special Information Type Update Page</td>
</tr>
</tbody>
</table>
Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_PERSON_SIT_REVIEW_SS</td>
<td></td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

Not applicable
Other Employment Information

The Other Employment Information module enables you to store assignment and employment information in descriptive flexfields and Developer Descriptive Flexfields (DDFs).

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Other Employment Info V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_OTHER_EMPLOY_INFO_TOP_SS</td>
<td>Other Employment Information</td>
</tr>
<tr>
<td>HR_OTHER_EMPLOYMENT_INFO_SS</td>
<td>Other Employment Information</td>
</tr>
<tr>
<td>HR_COLLECTIVE_AGREEMENTS_SS</td>
<td>Collective Agreements</td>
</tr>
<tr>
<td>HR_CAGR_SS</td>
<td>CAGR</td>
</tr>
<tr>
<td>HR_ASSIGNMENT_INFO_SS</td>
<td>Assignment Info</td>
</tr>
<tr>
<td>HR_CONFIGURABLE_PAY_INFO_SS</td>
<td>Configurable Pay Info</td>
</tr>
<tr>
<td>HR_COLLECTIVE_AGREEMENTS_LOV_SS</td>
<td>Collective Agreements LOV</td>
</tr>
<tr>
<td>HR_CONTRACT_LOV_SS</td>
<td>Contract LOV</td>
</tr>
</tbody>
</table>
Other Employment Information Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CAGR_GRADE_LOV_SS</td>
<td>CAGR Grade LOV</td>
</tr>
<tr>
<td>HR_ESTABLISHMENT_LOV_SS</td>
<td>Establishment LOV</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_OTHER_EMPLOYMENT_INFO_SS</td>
<td>Other Employment Info</td>
<td>HR Instruction</td>
<td>Long Message</td>
<td>HR_INST_TOP_COMMON_TEXT</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_CAGR_SS</td>
<td>CAGR</td>
<td>CAGR Key Flex</td>
<td>CAGR</td>
</tr>
<tr>
<td>HR_ASSIGNMENT_INFO_SS</td>
<td>Assignment Info</td>
<td>Assignment Flexfield</td>
<td>PER_ASSIGNMENTS</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable
Pay Rate

You use the Pay Rate module in the Work Schedule workflow process to enable a manager to change an employee’s overall pay rate directly (Single Pay Rate) or to create component increases to the previous rate (Multiple Pay Rate). You can change pay rates independently of assignment changes or as part of an assignment change.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Pay Rate V4.0

Configurable Workflow Attributes:

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Pay Rate V4.0</td>
<td>HR_P_RATE_JSP_PRC</td>
<td>Pay Rate V4.0</td>
</tr>
</tbody>
</table>

See: Configuring Workflow Attributes: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Pay Rate Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_P_RATE_TOP_SS</td>
<td>Pay Rate Page</td>
</tr>
<tr>
<td>HR_P_RATE_SINGLE_SS</td>
<td>Pay Rate Single</td>
</tr>
<tr>
<td>HR_P_RATE_SINGLE_TABLE_SS</td>
<td>Pay Rate Single Table</td>
</tr>
</tbody>
</table>
Implementing Oracle Self-Service Human Resources 4.0

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_P_RATE_MULTIPLICITE_SS</td>
<td>Pay Rate Multiple</td>
</tr>
<tr>
<td>HR_P_RATE_MULTIPLICITE_TABLE_SS</td>
<td>Pay Rate Multiple Table</td>
</tr>
<tr>
<td>HR_P_RATE_MISC_FIELDS_CELL_SS</td>
<td></td>
</tr>
<tr>
<td>HR_P_RATE_MISC_FIELDS_ROW_SS</td>
<td></td>
</tr>
<tr>
<td>HR_P_RATE_MISC_FIELDS_TABLE_SS</td>
<td>Pay Rate Misc Fields Table (Quartile, Compare Ratio, Grade Range, Grade Mid Point, Last Pay Change, Changed On, FLSA Status)</td>
</tr>
<tr>
<td>HR_P_RATE_SAL_FLEX_CELL_SS</td>
<td>Pay Rate Salary Admin Flex Cell</td>
</tr>
<tr>
<td>HR_P_RATE_SAL_FLEX_ROW_SS</td>
<td></td>
</tr>
</tbody>
</table>

**Pay Rate Review Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_P_RATE_REVIEW_SS</td>
<td>Pay Rate Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

**FlexFields:**

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_P_RATE_SAL_FLEX_CELL_SS</td>
<td>Pay Rate Salary Admin Flex Cell</td>
<td>PayRate Salary Admin Flex</td>
<td>PER_PAY_PROPOSALS</td>
</tr>
<tr>
<td>HR_P_RATE_MULTIPLICITE_TABLE_SS</td>
<td>Pay Rate Multiple Table</td>
<td>PayRate Proposal Component Flex</td>
<td>PER_PAY_PROPOSAL_COMPONENTS</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5
Change Manager

The Change Manager workflow process enables a manager to transfer an employee to another manager, move the direct reports of one manager to another manager and to assemble a new set of direct reports to a new manager. A new manager can be appointed from inside or outside a security domain.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Manager V4.0

Configurable Workflow Attributes:

Not applicable

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Manager V4.0</td>
<td>Change Manager V4.0</td>
<td>HR_MANAGER_REQUIRED_INDICATOR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR_TERM_SUP_FLAG</td>
</tr>
</tbody>
</table>

HR_TERM_SUP_FLAG

This item-level attribute is used when the Change Manager page is invoked from the Termination page. If the attribute is set to yes, only the Direct Reports region is displayed.

HR_MANAGER_REQUIRED_INDICATOR

If this attribute has a value of "Y", the employee must have a manager. If this attribute has a value of "N", the supervisor_id field of the per_all_assignments_f record can remain blank.

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:
Regions

**Supervisor Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_MANAGER_TOP_SS</td>
<td>Manager (Top Region)</td>
</tr>
<tr>
<td>HR_MANAGER_SS</td>
<td>Manager Update</td>
</tr>
<tr>
<td>HR_NEW_MANAGER_SS</td>
<td>New Manager</td>
</tr>
<tr>
<td>HR_DIRECT_REPORT_SS</td>
<td>Direct Report of Selected Employee</td>
</tr>
<tr>
<td>HR_NEW_DIRECTREPORT_SS</td>
<td>New Direct Reports</td>
</tr>
<tr>
<td>HR_LIST_OF_EMPLOYEES_SS</td>
<td>List of all Employees</td>
</tr>
<tr>
<td>HR_DIRECTREPORTS_TABLE_SS</td>
<td>Direct Reports of an Employee</td>
</tr>
<tr>
<td>HR_NEW_DIRECTREPORTS_TABLE_SS</td>
<td>New Direct Reports</td>
</tr>
<tr>
<td>HR_NEWMANAGER_LOV_SS</td>
<td>List of all Employees in the Add New Di-</td>
</tr>
<tr>
<td></td>
<td>rect Reports Region</td>
</tr>
<tr>
<td>HR_MANAGER_REVIEW_SS</td>
<td>Manager Review</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

**Tips and Instructions**

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_NEW_MANAGER_SS</td>
<td>New Manager</td>
<td>HR Instruction</td>
<td></td>
<td>HR_INST_SUPERVISOR_MAIN</td>
</tr>
<tr>
<td>HR_DIRECTREPORT_SS</td>
<td>Direct Reports of Selected Employee</td>
<td>HR Instruction</td>
<td></td>
<td>HR_INST_SUPERVISOR_DIRECT</td>
</tr>
<tr>
<td>HR_NEW_DIRECTREPORT_SS</td>
<td>New Direct Reports</td>
<td>HR Instruction</td>
<td></td>
<td>HR_INST_SUPERVISOR_NEW_DIRECT</td>
</tr>
<tr>
<td>Region ID</td>
<td>Region Name</td>
<td>Attribute Name</td>
<td>Tip Type</td>
<td>Message Name</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------------</td>
<td>----------------</td>
<td>-----------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>HR_DIRECTREPORTS_TABLE_SS</td>
<td>Direct Reports</td>
<td>Effective Transfer Date</td>
<td>Long Message</td>
<td>HR_TIP_SUPERVISOR_DR_DATE</td>
</tr>
<tr>
<td>HR_NEWDIRECTREPORTS_TABLE_SS</td>
<td>New Direct Reports</td>
<td>Effective Transfer Date</td>
<td>Long Message</td>
<td>HR_TIP_SUPERVISOR_NDR_DATE</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

**FlexFields:**

Not applicable

**Configurable Profile Options**

Not applicable
Overview

The HR Views module is intended to be used by HR Professionals. It offers a summarized view of different aspects of employee information: Personal Information, Assignment Details, Compensation Activity, and Termination History.

Each area of information is displayed on separate pages. From each page, the user can simply click a button and display different information.

All information displayed in the HR Views is for viewing only. To modify the information displayed, the user would have to log on with the Manager Self Service V4.0 responsibility.

The HR Views functionality is reached using the HR User Self Service responsibility and the HR Views function.

**Note:** Only use the HR Views functionality with the HR Professional V4.0 responsibility. Do not add the HR Views function to the Manager or Employee responsibilities.

The following chapter outlines the technical information for the separate HR Views pages.

The Views functions are displayed on tabbed regions. For information on configuring tabbed regions, see: Configuring Tabbed Regions: page 7 – 6.
Personal Information View

The Personal Information view displays the details relevant to an employee. This information need not relate to their job or employment contract.

The Personal Information page displays any specific fields which you have defined as flexfields and can also display a country-specific section which will display localization fields, for example, the national identifier or visa information.

All the information in the Personal Information view relates to the current record for the employee and no history is displayed.

**Note:** If the employee has been rehired, the SSHR application displays the last termination date.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Views</td>
<td>View Employee/Personal Information</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_EPI_TOP_SS</td>
<td>EPI Employee Information View Top</td>
</tr>
<tr>
<td>HR_VIEW_EPI_ASSIGNMENT_DTLS_SS</td>
<td>EPI Assignment Details Region</td>
</tr>
</tbody>
</table>
### Implementing Oracle Self-Service Human Resources 4.0

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_EPI_QUAL_DTLS_SS</td>
<td>EPI Qualification Details Regions</td>
</tr>
<tr>
<td>HR_VIEW_EPI_WORK_DTL_SS</td>
<td>EPI Work Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_EPI_QUAL_CONTAINER_SS</td>
<td>EPI Qualification Container Region</td>
</tr>
<tr>
<td>HR_VIEW_EPI_PER_CONTACT_DTL_SS</td>
<td>EPI Contact Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_EPI_FURTHER_PER_INF_SS</td>
<td>EPI Further Person Information</td>
</tr>
<tr>
<td>HR_VIEW_EMPLOYEE_DTL_SS</td>
<td>EPI Employee Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_EPI_DESCFLEX_SS</td>
<td>EPI Descriptive Flexfield Region</td>
</tr>
<tr>
<td>HR_VIEW_EPI_ADDTNL_PER_DTL_SS</td>
<td>EPI Additional Person Details</td>
</tr>
<tr>
<td>HR_VIEW_EPI_ADDRESS_DTL_SS</td>
<td>EPI Address Detail Region</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

**Tips and Instructions**

Not applicable

### FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_EPI_ADDR_ESS_DTL_SS</td>
<td>EPI Address Detail Region</td>
<td>hraddressflex</td>
<td>Address Structure</td>
</tr>
<tr>
<td>HR_VIEW_EPI_ADDR_ESS_DTL_SS</td>
<td>EPI Address Detail Region</td>
<td>hraddressflex2</td>
<td>Address Structure</td>
</tr>
<tr>
<td>HR_VIEW_EPI_ADDTNL.PER_DTL_SS</td>
<td>EPI Additional Person Details</td>
<td>Additional Person Details Flex</td>
<td>PER_PEOPLE</td>
</tr>
<tr>
<td>HR_VIEW_EPI_FURTHER.PER_INF_SS</td>
<td>EPI Further Person Information</td>
<td>Further Person Information Flex</td>
<td>Person Developer DF</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

### Configurable Profile Options

Not applicable
Assignment Details View

The Assignment Details view displays the assignment information for a particular employee. The HR Professional can display the different employee assignments, including the information set up in customer flexfields.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Views</td>
<td>View Employee Assignment Details</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:
Not applicable

Configurable Workflow Attributes:
Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Assignment Details Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_AD_TOP_SS</td>
<td>AD Assignment Details View Top</td>
</tr>
<tr>
<td>HR_VIEW_AD_HISTORY_OVERVIEW_SS</td>
<td>AD Assignment History Overview Region</td>
</tr>
<tr>
<td>HR_VIEW_AD_HISTORY_DETAIL_SS</td>
<td>AD Assignment History Detail Region</td>
</tr>
</tbody>
</table>

HR Views 12 – 5
<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_AD_HISTORY_CONTAIN_SS</td>
<td>AD Assignment History Container Region</td>
</tr>
<tr>
<td>HR_VIEW_AD_GENERAL_DTL_SS</td>
<td>AD General Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_AD_FURTHER_PER_INF_SS</td>
<td>AD Further Person Information</td>
</tr>
<tr>
<td>HR_VIEW_ADD_FORM_CONTAINER_SS</td>
<td>AD Assignment Details View Form Container</td>
</tr>
<tr>
<td>HR_VIEW_AD_EMPLOYEE_DTL_SS</td>
<td>AD Employee Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_AD_DESCFLEX_SS</td>
<td>AD Descriptive Flexfield Region</td>
</tr>
<tr>
<td>HR_VIEW_AD_CUR_ASSIGNMENT_SS</td>
<td>AD Current Assignment Region</td>
</tr>
<tr>
<td>HR_VIEW_AD_ASS_SELECT_SS</td>
<td>AD Assignment Selection Region</td>
</tr>
<tr>
<td>HR_VIEW_AD_ADDTNL_PER_DTL_SS</td>
<td>AD Additional Person Details</td>
</tr>
<tr>
<td>HR_VIEW_AD_ADDASS_FLEX_SS</td>
<td>AD Additional Assignment Details Desc Flex Region</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_AD_CUR_ASSIGNMENT_SS</td>
<td>AD Current Assignment Region</td>
<td>HR Job Key Flex</td>
<td>Job Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_AD_CUR_ASSIGNMENT_SS</td>
<td>AD Current Assignment Region</td>
<td>HR Position Key Flex</td>
<td>Position Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_AD_CUR_ASSIGNMENT_SS</td>
<td>AD Current Assignment Region</td>
<td>HR Grade Key Flex</td>
<td>Grade Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_AD_ADDASS_FLEX_SS</td>
<td>AD Additional Assignment Details Desc Flex Region</td>
<td>Assignment Flex Field</td>
<td>PER_ASSIGNMENTS</td>
</tr>
<tr>
<td>HR_VIEW_AD_FURTHER_PER_INF_SS</td>
<td>AD Further Person Information</td>
<td>Further Person Information Flex</td>
<td>Person Developer DF</td>
</tr>
<tr>
<td>HR_VIEW_AD_ADDITIONAL_PER_DTL_SS</td>
<td>AD Additional Person Details</td>
<td>Additional Person Details Flex</td>
<td>PER_PEOPLE</td>
</tr>
<tr>
<td>Region ID</td>
<td>Region Name</td>
<td>Attribute Name</td>
<td>FlexField Name</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------</td>
<td>----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>HR_VIEW_AD_HISTORY_DETAIL_SS</td>
<td>AD Assignment History Detail Region</td>
<td>HR Job Key Flex</td>
<td>Job Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_AD_HISTORY_DETAIL_SS</td>
<td>AD Assignment History Detail Region</td>
<td>HR Position Key Flex</td>
<td>Position Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_AD_HISTORY_DETAIL_SS</td>
<td>AD Assignment History Detail Region</td>
<td>HR Grade Key Flex</td>
<td>Grade Flexfield</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

**Configurable Profile Options**

Not applicable
Compensation Activity View

The Compensation activity view displays the salary and benefits information for an employee.

Note: The self-service Manager views also contain a Salary Information view although this view does not contain information on the employee’s benefits.

The Compensation Activity view displays all the elements for an employee unless they are linked to benefit plans and, therefore, have rates defined. If this is the case, only the rates are displayed.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Views</td>
<td>View Employee Compensation Activity</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:
Not applicable

Configurable Workflow Attributes:
Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_CA_TOP_SS</td>
<td>CA Compensation Activity View Top</td>
</tr>
<tr>
<td>HR_VIEW_CA_COMP_ELEMENTS_SS</td>
<td>CA Compensation Elements Region</td>
</tr>
</tbody>
</table>

Implementing Oracle Self-Service Human Resources 4.0
<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_CA_COMP_RATES_SS</td>
<td>CA Compensation Rates Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_ADDASS_FLEX_SS</td>
<td>CA Additional Assignment Details Desc Flex Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_ADDSAL_FLEX_SS</td>
<td>CA Additional Salary Details Desc Flex Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_ADDTNL_PER_DTL_SS</td>
<td>CA Additional Person Details</td>
</tr>
<tr>
<td>HR_VIEW_CA_COMP_CONTAINER_SS</td>
<td>CA Compensation Container Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_DESCFLEX_SS</td>
<td>CA Descriptive Flexfield Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_EMPLOYEE_DTL_SS</td>
<td>CA Employee Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_FURTHER_PER_INF_SS</td>
<td>CA Further Person Information</td>
</tr>
<tr>
<td>HR_VIEW_CA_GENERAL_DTL_SS</td>
<td>CA General Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_SALARY_DTL_SS</td>
<td>CA Salary Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_CA_WORK_DTL_SS</td>
<td>CA Work Detail Region</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_CA_WORK_DTL_SS</td>
<td>CA Work Detail Region</td>
<td>HR Job Key Flex</td>
<td>Job Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_CA_WORK_DTL_SS</td>
<td>CA Work Detail Region</td>
<td>HR Position Key Flex</td>
<td>Position Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_CA_WORK_DTL_SS</td>
<td>CA Work Detail Region</td>
<td>HR Grade Key Flex</td>
<td>Grade Flexfield</td>
</tr>
</tbody>
</table>
### Implementing Oracle Self-Service Human Resources 4.0

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_CA_ADDSAL_FLEX_SS</td>
<td>CA Additional Salary Details</td>
<td>Salary Flex</td>
<td>PER_PAY_PROPOSALS</td>
</tr>
<tr>
<td></td>
<td>Desc Flex Region</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR_VIEW_CA_ADDTNL_PER_DTL_SS</td>
<td>CA Additional Person Details</td>
<td>Additional Personal Details Flex</td>
<td>PER_PEOPLE</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

### Configurable Profile Options

Not applicable
Termination History View

The Termination History view displays any termination history for an employee. If an employee’s contract is terminated and the employee is subsequently rehired, the application updates the information displayed in the view so that the employee is not displayed as Terminated.

The employee’s record may contain more that one termination, for example, if they have been rehired more than once.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Views</td>
<td>View Employee Termination History</td>
</tr>
</tbody>
</table>

See: Defining User Access andMenus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:
Not applicable

Configurable Workflow Attributes:
Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Termination History Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_TH_TOP_SS</td>
<td>TH Termination History View Top</td>
</tr>
<tr>
<td>HR_VIEW_TH_ADDPDS_FLEX_SS</td>
<td>TH Additional Periods of Service Desc Flex Region</td>
</tr>
</tbody>
</table>
### Region Code

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_TH_ADDASS_FLEX_SS</td>
<td>TH Additional Assignment Details Desc Flex Region</td>
</tr>
<tr>
<td>HR_VIEW_TH_ADDTNL_PER_DTL_SS</td>
<td>TH Additional Person Details</td>
</tr>
<tr>
<td>HR_VIEW_TH_DESCFLEX_SS</td>
<td>TH Descriptive Flexfield Region</td>
</tr>
<tr>
<td>HR_VIEW_TH_EMPLOYEE_DTL_SS</td>
<td>TH Employee Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_TH_FURTHER_PER_INF_SS</td>
<td>TH Further Person Information</td>
</tr>
<tr>
<td>HR_VIEW_TH_INFPPDS_FLEX_SS</td>
<td>TH Additional Periods of Service Information Desc Flex Region</td>
</tr>
<tr>
<td>HR_VIEW_TH_TERM_DTL_SS</td>
<td>TH Termination Detail Region</td>
</tr>
<tr>
<td>HR_VIEW_TH_WORK_DTL_SS</td>
<td>TH Work Detail Region</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

### Tips and Instructions

Not applicable

### FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_TH_WRK_DTL_SS</td>
<td>TH Work Detail Region</td>
<td>HR Job Key Flex</td>
<td>Job Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_TH_WRK_DTL_SS</td>
<td>TH Work Detail Region</td>
<td>Hr Position Key Flex</td>
<td>Position Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_TH_WRK_DTL_SS</td>
<td>TH Work Detail Region</td>
<td>HR Grade Key Flex</td>
<td>Grade Flexfield</td>
</tr>
<tr>
<td>HR_VIEW_TH_ADDDTNL_PER_DTL_SS</td>
<td>TH Additional Person Details</td>
<td>Additional Personal Details</td>
<td>PER_PEOPLE</td>
</tr>
<tr>
<td>HR_VIEW_TH_FURTHER_PER_INF_SS</td>
<td>TH Further Person Information</td>
<td>Further Person Information Flex</td>
<td>Person Developer DF</td>
</tr>
<tr>
<td>HR_VIEW_TH_ADDDPDS_FLEX_SS</td>
<td>TH Additional Periods of Service Desc Flex Region</td>
<td>Per Periods of Service</td>
<td>PER_PERIODS_OF_SERVICE</td>
</tr>
</tbody>
</table>

12 - 12 Implementing Oracle Self-Service Human Resources 4.0
<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_VIEW_TH_INF</td>
<td>TH Additional Periods of Service Information</td>
<td>Per Periods of Service</td>
<td>PER_PDS_DEVELOPER_DF</td>
</tr>
<tr>
<td>PDS_FLEX_SS</td>
<td>Desc Flex Region</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR_VIEW_TH_AD</td>
<td>TH Additional Assignment Details</td>
<td>Assignment Flexfield</td>
<td>PER_ASSIGNMENTS</td>
</tr>
<tr>
<td>DASS_FLEX_SS</td>
<td>Desc Flex Region</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See: Configuring Flex Segments: page 7 – 5

**Configurable Profile Options**

Not applicable
Search Functions for HR Views

The first Search function for HR Views is displayed when an HR Professional selects the HR Views option from the self–service menu (when using the HR User Self Service responsibility). At this point, the user can only search for an employee.

The second Search function for HR Views is displayed when the HR Professional has searched for an employee. At this point, the user can either view data for the selected employee or search for another employee.

Menu and Function Names

These modules can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR User Self Service (HR_USER_SELF_SERVICE_V4.0)</td>
<td>HR Views Person Search Initial Screen</td>
</tr>
<tr>
<td>HR Views Menu (HR_VIEWS Menu)</td>
<td>HR Views Person Search</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:
Regions

Search Functions

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_SUPER_PERSON_SEARCH_TOP1_SS</td>
<td>HR User Person Search</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

Not applicable
CHAPTER 13

Benefits and Individual Compensation Distributions
Self–Service Benefits supports a variety of enrollment types, including open, unrestricted, and life event enrollments for one or more flex or non–flex programs.

The enrollment choices, price tags, and other information in Self–Service Benefits web pages are derived from Oracle Applications database tables using the rules of your plan design. To implement Self–Service Benefits, you need to match your current business set up in Oracle HRMS for self–service use.

Self–Service Benefits supports enrollment for plans and options in a program. Use Oracle’s professional forms interface or the self–service Individual Compensation Distribution web pages to enroll participants in all plans not in a program such as savings plans, Employee Stock Purchase Plans (ESPP), or 401(k) plans.

Self–Service Benefits Enrollment Functionality

Self–Service Benefits offers an employee the opportunity to:

- Review current program benefits enrollments
- Select benefits
- Distribute excess flex credits (Advanced Benefits)
- Add, update, or review family member information
  
  **Note:** Family member information entered through the self–service interface and personal contact data entered through the professional forms interface share the same table. Any data entered or updated in Self–Service HRMS or the professional forms interface is reflected in both interfaces.

- Add, update, or remove dependents
- Add, update, or remove beneficiaries (You cannot enter organizations as beneficiaries in Self–Service at this time.)
  
  **Note:** Self–Service requires dependents and beneficiaries to have the personal relationship check box checked on the Contacts window.

- Search for and select primary care providers
- Print a temporary participant identification card

Plan Design Considerations for Self–Service Benefits

Before eligible participants can enroll in a benefit plan using the self–service interface, you must design your plan using Oracle’s
professional forms interface. The following topics look at the points you should consider when designing your plan for the self-service environment.

**Legislative Configurations**

Self-Service Benefits is delivered with US-style formatting for the following fields:

- Address
- Social Security Number
- Pre Tax Cost
- After Tax Cost

For non-US self-service implementations, you can edit field labels to fit your legislative requirements and you can also hide and unhide fields. For example, you may want to hide the list of States from the address fields when entering family members.

**Note:** Self-Service Benefits inherits the address style and country used by the primary benefits participant.

If your legislation or benefits plan design does not allow for after tax contributions, consider hiding the after tax columns on the tables contained in the following web pages:

- Benefits Enrollment Overview
- Current Benefits Overview
- Benefits Selection
- Confirmation

See: Setting Up Self-Service Benefits Web Pages: page 13 – 10

See: Benefits Enrollments: page 13 – 15 for a list of the configurable user interface elements in each delivered web page.

**Setting the Horizontal or Vertical Display of Plan Types, Plans, and Options**

Navigate to the Plan Types window in the professional forms user interface to set the table display format of electable compensation and benefits options.

Use a horizontal display for medical, dental, and vision plan types. A horizontal display:

- Lists options horizontally across the columns of a table
- Limits enrollment to a maximum of one plan per plan type
• Is not used with plans that calculate coverage amounts, such as life insurance plans
• Requires the definition of a waive plan

<table>
<thead>
<tr>
<th></th>
<th>Employee Only</th>
<th>Employee Plus One</th>
<th>Employee Plus Family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan A</td>
<td>120</td>
<td>150</td>
<td>180</td>
</tr>
<tr>
<td>Plan B</td>
<td>130</td>
<td>160</td>
<td>190</td>
</tr>
<tr>
<td>Waive Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Using the radio buttons in the Self–Service interface, a participant can select only one plan and option combination at a time. The waive plan provides a means of indicating that no coverage is selected in the plan type.

Use a vertical display (the default value if you make no selection) for plan types other than medical, dental, and vision. Plans with more than four options—such as insurance plans—use a vertical display to prevent unnecessary horizontal scrolling in the browser window. A vertical display:
• Lists options vertically in the column of a table
• Enables the election of multiple plans in a plan type
• Is used for plans that calculate coverage amounts, such as life insurance plans
• Must have a waive option

<table>
<thead>
<tr>
<th>Plan A</th>
<th>Coverage</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option 1x Salary</td>
<td>50,000</td>
<td>.75</td>
</tr>
<tr>
<td>Option 2x Salary</td>
<td>100,000</td>
<td>1.50</td>
</tr>
<tr>
<td>Option 3x Salary</td>
<td>150,000</td>
<td>2.25</td>
</tr>
<tr>
<td>Waive Option</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option 1x Salary</td>
<td>50,000</td>
<td>.40</td>
</tr>
<tr>
<td>Waive Option</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Using the radio buttons in the Self–Service interface, a participant can select more than one plan and option combination in the plan type, but only one option within a plan at a time. The waive option provides a means of indicating that no coverage is selected within a plan.

See: Declining Coverage: page 13 – 6
See: Defining Plan Types, Managing Total Compensation Using Oracle HRMS
Flexible Spending Accounts (US)

To ensure that your qualifying participants can enroll in Flexible Spending Account (FSA) plans using Self-Service Benefits, you must set up your plans using the following method.

Use the Plan Types window to define one plan type for each FSA plan. For example, define one plan type for Dependent Care FSA plans and a second plan type for Health Care FSA plans. For each plan type, you define the flexible spending account plan or plans into which participants and their dependents can enroll. You also define a **decline** plan which you link to each plan type.

Other items for consideration:

- Select a Self-Service Display of Vertical for the Plan Type
- You enable a participant to enter an annual coverage amount during enrollment by checking the Enter Value at Enrollment field in the Calculation Method region of the Coverage Calculations window when you define the coverage calculation for the FSA plan.
- Define any minimum or maximum annual coverage amounts or coverage increments.
- Use the Standard Rates window to define the payroll contribution by selecting a calculation method of Set Annual Rate Equal to Coverage for the FSA plan.
- Check the Display on Enrollment and Assign on Enrollment check boxes.

Flexible Benefits Programs (Advanced Benefits)

With Flexible Benefits Programs, you can offer flex credits to eligible participants to offset the cost of benefits.

When you define a benefit program in the Programs window, select the same periodicity for the activity reference period (the time period in which the system expresses activity rates) and the enrollment rate frequency (the activity rate that is communicated to participants). You must select either per month or per year. This ensures that the application expresses benefit price tags and available flex credits to participants for the same time period.

**Note:** Self-Service Benefits only displays the enrollment rate frequency to the end-user; the activity reference period does not display.

Other items for consideration:

- Unless your flex credits are determined using the result of a calculation, you indicate the number of flex credits associated with a
Implementing Oracle Self-Service Human Resources 4.0

compensation object by entering the value in the Flat Amount field in the Calculation Method region of the Flex Credits window.

- You must set up a flex credits placeholder plan and link this plan to the flex program. This plan records the total flex credits for the program. Define a rate for this plan by entering zero in the Flat Amount field of the Calculation Method region of the Standard Rates window.
- Set the processing type of the corresponding element to Recurring.

Temporary Participant Identification Cards

A temporary identification card allows a participant to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider. Using Self-Service Benefits, a participant can print one card for each elected plan which allows for temporary identification cards. The participant can also print a card for each covered dependent.

The application generates a temporary ID card upon:
- Enrollment
- Re-enrollment
- Change in Enrollment
- Participant Request (due to loss)

The identification card includes information such as:
- Employee Name and Social Security Number
- Member Name and Social Security Number (for dependents)
- Employer Name
- Plan Name

You indicate that a plan allows for the printing of temporary ID cards by checking the Allow Temporary Identification field on the Plans window.

Declining Coverage

Depending on your plan design, you must set up either a decline coverage plan or option that allows a participant to waive an enrollment opportunity for which they are otherwise eligible.

If a plan type contains multiple plans, you create a decline coverage plan in the Plans window (in addition to the regular plans) and indicate that the plan is of the specified plan type. If a plan type has only one plan, you define a decline coverage option and link it to the plan. This ensures that participants can either select or decline benefit coverage.
A typical plan design features a decline coverage plan for medical, dental, and vision plans, and a decline coverage option for insurance plans.

**Note:** If your plan design *requires* that a participant select at least one option from a group of options or at least one plan from a group of plans, do not define a decline coverage plan or option.
Setting Up Self-Service Benefits Enrollments

You must complete your plan design in the professional forms interface before you can view a self-service benefits enrollments web page. If you license Advanced Benefits, you can run the Participation Batch Process from the Concurrent Manager to create electable choices for eligible participants.

If you use Standard Benefits, or if you are an Advanced Benefits customers using the **unrestricted** enrollment method, you can begin to allow participant enrollments after you create your plan design. The application creates the self-service enrollment page when the person logs into Self-Service Benefits.

To set up self-service benefits enrollments:

1. Review the sample benefits web pages. You can configure the following elements using the Configuration Framework:
   - Section titles
   - Table Layout
   - Hints
   - Tips
   - Field labels
   See: Configuring Web Pages: page 7 – 4

2. Define instruction text for each web page region. You do this by defining a communication type and associating the instruction text with a web page Region.
   See: Defining Communication Types, Managing Total Compensation Using Oracle HRMS

   You can include a link in your instruction text to another web site using HTML syntax. You could create a link to reference information contained in a summary plan description. For example:

   See the `<a href="http://www.visionmedical.com" target=_newWindow">Vision Medical web site</a>` for more information.

   In this example, the application opens the web page in a new browser window.

3. Define when you want the instruction text displayed. You can vary the instruction displayed according to:
4. Create a hypertext link from a compensation object to a web page which describes that program, plan type in program, plan in program, plan, or option in plan. To create a hypertext link, use one or more of the following windows:
   - Programs (for a program)
   - Plan and Plan Type window (for a plan or a plan type in program)
   - Plans window (for a plan)
   - Maintain Plan Options window (for an option in a plan)

   The link appears in the Benefits Selection web page, or—for Programs—the Overview page.

   See: Defining a Benefits Program, Managing Total Compensation Using Oracle HRMS

5. Review Messages and change any that do not meet your requirements.

6. Configure Action Item messages (Advanced Benefits) to meet your requirements.

   The application displays Action Item messages at the end of the enrollment process on the Confirmation page.

   See: Enrollment Action Types, Managing Total Compensation Using Oracle HRMS

7. Configure whether benefits participants have the option to select a Primary Care Provider (PCP) for a benefits plan.

   See: Maintaining Primary Care Providers for a Plan: page 13 – 30

8. Configure whether you want benefits participants to have access to the Primary Care Provider Search facility.

   See: Configuring the Primary Care Provider Search Facility: page 13 – 33
Setting Up Self–Service Benefits Web Pages

This topic explains how to configure the appearance of your web pages using the Web Applications Dictionary (AK Dictionary), Function security, and the Configuration Framework.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

To access the Web Applications Dictionary, log on to Oracle HRMS with an AK Developer responsibility and open the Regions window.

See: Benefits Enrollments: page 13 – 15 for more information about configurable items, such as help tips.

Note: All data changes entered in the Web Applications Dictionary require you to restart the Apache web server to see your changes.

To set up self–service benefits web pages:

1. If you create a new submenu, you must update the AK regions which point to the submenu.

   The Benefits Self Service submenu controls the tabs—Benefits Enrollment and Current Benefits—that appear on a number of the enrollment web pages.

   Because the submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The functions you link to this submenu map to the tabs. The submenu prompts appear as the function labels.

   Complete steps 2 to 7 to update the region items, or proceed to step 8 if you do not intend to create any new submenus.

   See: Configuring Tabbed Regions: page 7 – 6

2. Using an AK Developer responsibility, log on to the application.

3. Open the Regions window.

4. Query one of the following regions in the Region ID field:
   - BEN_BENEFICIARY_PAGE
   - BEN_CURR_OVW_PAGE
   - BEN_ENRL_CONF_PAGE
   - BEN_ENRLDEPENDENTS_PAGE
   - BEN_ENRL_OVERVIEW_PAGE
5. Choose the Region Items button to open the Region Items window.

6. In the Attribute Name column, select the Application Menu entry.

7. Scroll to the Menu Name column and update the field with the new menu as entered in the Menu field of the Menus window.

8. If you customize the seeded functions—BEN_SS_BNFT_ENRT or BEN_SS_MNGR_ENRT—you must update your custom function to use the seeded parameters and HTML Calls.

   **Note:** It is a good practice to check the Readme for each Self–Service Benefits patch you apply to see if the parameters and HTML Calls for the seeded functions have changed.

9. During implementation you can choose whether to display the following hidden attributes by selecting the Node Display check box for the corresponding region.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Region</th>
<th>Web Page</th>
<th>Description</th>
</tr>
</thead>
</table>
| Taxable Cost    | BEN_OVW_SELECTIONS_TABLE | Benefits Enrollment Overview; Confirmation Page | Use this attribute to display a column for the taxable cost of a benefit.  
*Note:* This column corresponds to a standard rate with an activity type of Self–Service Display. |
| Address Line 1, Address Line 2, Address Line 3 | BEN_FAM_ADD_ADDRESS | Family Members and Others Detail Page | Use this attribute to configure non–US style address fields. |
| ICX Bucket3     | BEN_ENRL_CONFCONTENT | Confirmation Page                     | Use this attribute to add a region for a participant’s signature.  |
**Note:** Use the Taxable Cost attribute for miscellaneous values. This amount displays on the overview and confirmation pages, but not on the Benefits Selection Page.

10. Query a region of the web page you are configuring in the Region ID field of the Regions window.
   See: Benefits Enrollments: page 13 – 15 for a list of regions, tables, hints, and tips that you can configure.

11. Choose the Region Items button.
12. Select the Attribute Name for which you are editing a section title, hint, tip, table, or other information.
13. Enter new text in the Long Label column.
14. Select the Node Display check box to display an attribute in a Self–Service web page.
15. To reorder the sequence of columns in a table, change the sequence number of the column and increment that number by one. You can then save your new sequence, decrement the sequence number by one within each region, and save again. Reordering the sequence number of the table columns enables you to maintain the original sequence number.
Setting Up User Access to Self–Service Benefits

Self–Service Benefits functions are attached to the Benefits Self–Service menu. You can change menu names and function names, or remove menus and functions if required.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

If you create a new submenu, you must update the AK regions which point to the submenu.

See Setting Up Self–Service Benefits Web Pages: page 13 – 10
See: User’s Menu (Oracle Applications System Administrator’s Guide) for more information on configuring menus.

To set up user access to self–service benefits:

1. Log on to Oracle HRMS with the System Administrator responsibility.
2. Open the Menus window.
3. Query the Self–Service Menu in the Menu field:
   HR_EMPLOYEE_DIRECT_ACCESS_WEB. The following Self–Service User Menu Name displays to users:
   • Employee Self–Service V4.0
   You can change the menu name if required.
4. Query the Benefits Submenu in the Menu field:
   BEN_SELF_SERVICE_BENEFITS. The following Benefits Submenu User Name displays:
   • Benefits Self Service
   Because the Benefits Self Service submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The Benefits Self Service submenu has the following prompts.
   • Benefits Enrollment
   • Current Benefits
   These prompts function as the labels on the tabs of the self–service web page.
5. Create your own Self–Service Benefit functions from the sample functions supplied. The sample User Function Names are:
   • Self Service View Current Benefits
• Self Service Benefits Enrollment

The Function Names are:
• BEN_SS_CURR_BNFT
• BEN_SS_BNFT_ENRT

See: Form Functions Window (Oracle Applications System Administrator’s Guide)

6. Set Security Profiles. Use the System Profile Values window to link the responsibility you have created to a Security Profile and your Business Group. The Security Profile is:

- HR: Security Profile

  **Note:** If you fail to link your Responsibility to your Business group with the HR: Security Profile, any benefits participants who attempt to enroll will receive an error message indicating they cannot enroll.


7. Set the HR: Business Group Profile. Use the System Profile Values window to link the responsibility you have created to your Business Group. The Business Group Profile is:

- HR: Business Group

8. Define the people you would like to access Self-Service Benefits. There are two ways to do this. You may follow the typical steps for defining a new user and then assign each user to a responsibility that enables access to self-service benefits, one at a time. See: Users Window (Oracle Applications System Administrator’s Guide).

Or, you can set up concurrent programs to automate this manual process. See the White Paper titled: *Batch Creation of User Accounts* available from MetaLink.
Benefits Enrollments

This topic provides reference information you need to configure your Self-Service Benefit Enrollment web pages.

The tables below list—by web page—the regions that contain the instruction text, tables, hints, tips, and messages that you can modify.

For instruction text, the table also lists the communication short name that is required when you define the communication type and the valid communication usages that allow you to target the instruction text to a particular program, plan type, plan, or life event.

See: Setting Up Self-Service Benefits Web Pages: page 13 – 10 for an explanation of how to configure the various regions of the web page.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits Self Service</td>
<td>Benefits Enrollment</td>
</tr>
<tr>
<td>Benefits Self Service</td>
<td>Current Enrollment</td>
</tr>
</tbody>
</table>

See: Defining Menus for SSHR: page 5 – 12

Configurable Web Applications Dictionary Regions

The following definitions can be configured in the Configuration Framework:

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_ENRL_OVERVIEW_PAGE</td>
<td>Benefits Enrollment</td>
</tr>
<tr>
<td>BEN_CURR_OVW_PAGE</td>
<td>Current Benefits</td>
</tr>
<tr>
<td>BEN_FAMILY_MBRS_PAGE</td>
<td>Family Members and Others</td>
</tr>
<tr>
<td>BEN_FAM_ADD_PAGE</td>
<td>Ben Family Member Add Page</td>
</tr>
<tr>
<td>BEN_ENRT_SELECTION_PAGE</td>
<td>Ben Enrollment Selection Page</td>
</tr>
<tr>
<td>BEN_ENRL_DEPENDENTS_PAGE</td>
<td>Dependents</td>
</tr>
<tr>
<td>BEN_BENEFICIARY_PAGE</td>
<td>Beneficiaries</td>
</tr>
<tr>
<td>BEN_PCP_SELECT_PAGE</td>
<td>Primary Care Providers</td>
</tr>
</tbody>
</table>
Benefits Enrollment Overview Page

The Benefits Enrollment Overview web page enables a participant to view a record of their current benefits and to enroll into a new set of benefits.
Benefits and Individual Compensation Distributions

Current Benefits Overview Page

The Current Benefits Overview web page enables a participant to see a record of their current benefits.

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Required Communication Short Name</th>
<th>Valid Communication Usages</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_CURR_OVF_CONTENT</td>
<td>Current Benefits Overview Content</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.CURRENT_OVERVIEW_CONTENT</td>
<td>Program</td>
</tr>
<tr>
<td>BEN_FLEX_CREDITS</td>
<td>Flex Credits</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.FLEX_CREDITS</td>
<td>Program</td>
</tr>
<tr>
<td>BEN_OVERVIEW_FC_SUMMARY</td>
<td>Flex Credit Summary</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.OVERVIEW_FC_SUMMARY</td>
<td>Program</td>
</tr>
<tr>
<td>BEN_FLEX_CREDIT_ROLLOVERS</td>
<td>Flex Credit Rollovers</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.FLEX_CREDIT_ROLLOVERS</td>
<td>Program</td>
</tr>
<tr>
<td>BEN_OVERVIEW_SELECTIONS</td>
<td>Benefit Selections</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.OVERVIEW_SELECTIONS</td>
<td>Program</td>
</tr>
<tr>
<td>BEN_OVERVIEW_CVRD_DEPS</td>
<td>Covered Dependents</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.OVERVIEW_CVRD_DEPS</td>
<td>Program</td>
</tr>
<tr>
<td>BEN_ENRL_OVIEW_BENEF</td>
<td>Beneficiary Enrollment Overview</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.ENRL_OVIEW_BENEF</td>
<td>Program</td>
</tr>
<tr>
<td>BEN_OVW_PCP</td>
<td>Primary Care Providers Overview</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>CBO.OVERVIEW_PCP</td>
<td>Program</td>
</tr>
</tbody>
</table>
### Family Members and Others and Family Members and Others Detail Page

The Family Members and Others page enables a participant to review a record of their family members and other persons enrolled as dependents or beneficiaries of their benefits. Benefits participants can add another person to the Family Members and Others table by choosing the Add Another Person button. This opens the Family Members and Others Details page.
### Summary Page

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Required Communication Short Name</th>
<th>Valid Communication Usages</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_FAM_ADD_PAGE</td>
<td>Ben Family Member Add Page</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>BEN_FAM_ADD_CONTENT</td>
<td>Add or Update Family Members</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>FML.FAM_ADD.CONTENT</td>
<td>Program, Life Event</td>
</tr>
<tr>
<td>BEN_FAM_ADD_NAME</td>
<td>Name and Relationship</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>FML.FAM_ADD_NAME</td>
<td>Program, Life Event</td>
</tr>
<tr>
<td>BEN_FAM_ADD_ADDRESS</td>
<td>Address</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>FML.FAM_ADD_ADDRESS</td>
<td>Program, Life Event</td>
</tr>
<tr>
<td>BEN_FAM_ADD_OTHER</td>
<td>Misc Information</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>FML.FAM_ADD_OTHER</td>
<td>Program, Life Event</td>
</tr>
<tr>
<td>BEN_FAM_ADD_SECOND_MEDICAL</td>
<td>Second Medical Coverage</td>
<td>HR Instruction</td>
<td>Instruction</td>
<td>FML.FAM_ADD_SECOND_MEDICAL</td>
<td>Program, Life Event</td>
</tr>
<tr>
<td>BEN_FAM_ADD_ADDRESS</td>
<td>Address Warning Tip</td>
<td>Information Text 1</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>BEN_FAM_ADD_NAME</td>
<td>Suffix Hint</td>
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<tr>
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<td>Postal Code Hint</td>
<td>Postal Code</td>
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<td>National Identifier Hint</td>
<td>National Identifier</td>
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<td></td>
</tr>
<tr>
<td>BEN_FAM_ADD_OTHER</td>
<td>Date of Birth Hint</td>
<td>Date of Birth</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Required Field Message</td>
<td>Message #: 92601</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Invalid Birth Date Message</td>
<td>Message #: 92598</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Detail Page

**Benefits Selection Page**

The Benefits Selection page enables a participant to select one or more plans in which to enroll.
Dependents Selection Page

The Dependents Selection page enables a participant to add their dependents to a plan.

Note: For Advanced Benefits customers: if participant dependents are not displaying in this page, verify that you have linked the appropriate life events to the program or plan enrollment requirements in the Dependent Change of Life Event window.
### Beneficiary Selection Page

The Beneficiary Selection page enables a participant to add their beneficiaries to a plan.

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Required Communication Short Name</th>
<th>Valid Communication Usages</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_ENRL_DEPENDENTS_CONTENT</td>
<td>Can’t Designate Message</td>
<td>HR Instruction 2</td>
<td>Message #: 92588</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEN_ENRL_DEPENDENTS_SELECTION_TABLE</td>
<td>Table</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Primary Care Provider Page

The Primary Care Provider page enables a participant to select a care provider. If your enterprise partners with a third party supplier of primary care provider information, you can configure this page to allow web–based searches of a database of provider information.

See: Configuring the Primary Care Provider Search Facility: page 13 – 33
<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Required Communication Short Name</th>
<th>Valid Communication Usages</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_PCP_SELECT_PAGE</td>
<td>Primary Care Providers</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>BEN_PCP_SELECT_CONTENT</td>
<td>Primary Care Provider Selection Content</td>
<td>HR Instruction 1</td>
<td>Instruction</td>
<td>PCP:PcpSelectContentPageLevel</td>
<td>Program, Life Event</td>
</tr>
<tr>
<td>BEN_PCP_SELECT_CONTENT</td>
<td>Primary Care Provider Selection Content</td>
<td>HR Instruction 3</td>
<td>Instruction</td>
<td>PCP:PcpSelectContentPlanLevel</td>
<td>Program, Plan Type, Plan, Life Event</td>
</tr>
<tr>
<td>BEN_PCP_SELECT_TABLE</td>
<td>Primary Care Provider Table Hint</td>
<td>Help Tip</td>
<td>Hint</td>
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<td></td>
</tr>
<tr>
<td>BEN_PCP_SELECT_TABLE</td>
<td>Can’t Designate Message</td>
<td>HR Instruction 2</td>
<td>Message #: 92567</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Primary Care Provider Summary Page**

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Required Communication Short Name</th>
<th>Valid Communication Usages</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_PCP_SEARCH_PAGE</td>
<td>PCP Search Page</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEN_PCP_SEARCH_H</td>
<td>Primary Care Provider Search</td>
<td>HR Instruction</td>
<td>Instructions</td>
<td>PCS.PCP_SEARCH_H</td>
<td>Program, Plan Type, Plan, Life Event</td>
</tr>
<tr>
<td>BEN_PCP_SEARCH_H</td>
<td>Search Region Instruction</td>
<td>HR Instruction 1</td>
<td>Instruction</td>
<td>PCS.PCP_SEARCH_H_CRITERIA</td>
<td>Program, Plan Type, Plan, Life Event</td>
</tr>
<tr>
<td>BEN_PCP_SEARCH_H</td>
<td>Results Instruction</td>
<td>HR Instruction 2</td>
<td>Instruction</td>
<td>PCS.PCP_SEARCH_H_RESULT</td>
<td>Program, Plan Type, Plan, Life Event</td>
</tr>
<tr>
<td>BEN_PCP_SEARCH_H_RESULT</td>
<td>Results</td>
<td>Help Tip</td>
<td>Tip</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEN_PCP_XML_REQUEST_PAMS</td>
<td>No PCPs found message</td>
<td>Ben PCP Show Label</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>BEN_PCP_XML_REQUEST_PAMS</td>
<td>The “Map” label column in PCP search results</td>
<td>Ben PCP Direction</td>
<td></td>
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</tr>
<tr>
<td>BEN_PCP_XML_REQUEST_PAMS</td>
<td>PCP Results Table Bar Text</td>
<td>Ben PCP Result Table Bar</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Primary Care Provider Search Page

Confirmation Page

The Confirmation page enables a participant to see a summary of their choices and a warning of any oversights or miscalculations they may have made.

Note: You can also use the Confirmation page to display a signature region for participants to print from their web browser. Use this region if you require a participant’s signature as part of a benefits enrollment. Query the BEN_ENRL_CONFCONTENT region and click the Node Display check box for the ICX Bucket3 region.
### Unused Flex Credits Page

The Unused Flex Credits page provides a summary of the flex credits left unspent by a participant.
Unused Flex Credits will be rolled into participant’s paycheck message

Help Tip

Help Tip

Tip

Change Session Date Page

The Change Session Date page lets you test future-dated elections. For example, you may want to perform system testing before the start of an open enrollment period. This page should be removed in your production environment so that benefits participants do not alter their enrollment date.

See: Setting the Effective Date of a Scheduled Enrollment in Self-Service Benefits: page 13 – 27

Temporary ID Card Page

The Temporary ID Card page lets a participant print an ID card which the participant can use to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider.
<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Required Communication Short Name</th>
<th>Valid Communication Usages</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_ENRL_TEMP_PID_PAGE</td>
<td>Temporary Identification Card</td>
<td>Ben Instruction 1</td>
<td>Instruction</td>
<td>TMPENRL_TEMP_ID_PAGE</td>
<td>Program, Life Event</td>
</tr>
<tr>
<td>BEN_ENRL_TEMP_PID_CONTENT</td>
<td>Ben Temporary ID Card Content</td>
<td>Ben Instruction 2</td>
<td>Table Instruction</td>
<td>TMPENRL_TEMP_ID_PLAN</td>
<td>Program, Plan Type, Plan, Life Event</td>
</tr>
<tr>
<td>BEN_ENRL_TEMP_PID_CARDS</td>
<td>Ben Temporary ID Card</td>
<td>Ben Instruction 4</td>
<td>Instruction</td>
<td>TMPENRL_TEMP_ID_CARD</td>
<td>Program, Plan Type, Plan, Life Event</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4
Setting the Effective Date of a Scheduled Enrollment in Self–Service Benefits

Self–Service Benefits provides different ways of controlling the date on which the application records a participant election:

- The Change Session Date web page (for testing environments in both Standard and Advanced Benefits)
- The Change Session Date menu parameter (Standard Benefits)
- Normal date processing based on the session date (Advanced Benefits)

The Change Session Date web page lets you test future–dated elections, such as for an upcoming open enrollment period.

**Note:** You should remove this web page from your production environment so that benefits participants cannot alter their enrollment date.

Use the Change Session Date menu parameter if you use Oracle Standard Benefits and you want to record the life event occurred date of an enrollment for a date that is not equal to the system date.

For example, if you schedule your open enrollment period for the first two weeks in November, you can set the session date to record all enrollments as of January 1st of the following year.

**Note:** You can use both features simultaneously, but the date the user enters in the Change Session Date web page overrides the session date parameter for the current session.

---

**To set the session date in Self–Service Benefits:**

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to set the session date. Choose from:
   - BEN_SS_BNFT_ENRT (Employee Self–Service Benefits)
   - BEN_SS_MGR_ENRT (Manager Self–Service Benefits)
4. Choose the Form tab.
5. Update the seeded parameter to display the Change Session Date page or to set the effective date to a date you choose.

In the following example, setting `displayDate=Y` displays the Change Session Date web page. Setting `&sessionDate=12/31` sets the session date to December 31st for the BEN_SS_MGR_ENRT function.
You enter the session date in *mm/dd* format. Do not include the year.

**Note:** If you do not set the session date, Self-Service Benefits processes dates based on the date codes you select in your plan design.

### Deriving the Year of the Session Date

The application derives the year to use for the session date, so you should not include a year in the session date parameter. If you enter a session day and month that is prior to the *system* day and month, the application uses the current year.

If you enter a session date that is equal to or later than the system day and month, the application sets the session date to the following year.
Removing the Benefits Enrollment Overview Web Page (Standard Benefits)

If you use Standard Benefits, you can remove the Benefits Enrollment Overview web page from your Self-Service Benefits implementation during those periods when you do not want participants to enter or update benefits elections.

When you remove the Benefits Enrollment Overview page, participants can still view their current elections using the Current Benefits Overview web page.

To remove user access to the Benefits Enrollment Overview page:

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to set the session date. For example:
   - BEN_SS_BNFT_ENRT (Employee Self-Service Benefits)
4. Choose the Form tab.
5. Update the seeded parameter to disallow enrollments by setting allowEnrt=N.
6. Save your work.
Maintaining Primary Care Providers for a Plan

Based on your plan design, benefits participants may have the option, or be required, to select a Primary Care Provider (PCP) when electing a benefit plan.

You use the Maintain Plan Primary Care Providers window to define restrictions for the selection of a primary care provider. You also use this window to set high level configuration options for web-based PCP database searches that are performed through Oracle Self-Service Benefits.

To maintain primary care providers for a plan:

1. Select the Name of the plan for which you are maintaining primary care provider data.
2. Check the From Repository field if you are using Oracle Self-Service Benefits and the benefits participant selects a primary care provider through a searchable database of providers.
   
   **Note:** As a prerequisite, you must link an organization to this plan (using the Maintain Plan Related Details window) which has an Organization Role Type of Primary Care Provider Locator.

   **Note:** If you do not check the From Repository field, a participant cannot select a PCP from a list of valid PCPs. The participant must enter the PCP ID number or name in a free form text field.

3. **Note:** The Can Keep Provider field is reserved for future use.
4. Select a Designation Code to indicate if a participant who enrolls in this plan is required to select a PCP, or if PCP selection is optional.
5. Select a Dependent Designation Code to indicate if a participant who enrolls in this plan is required to select a PCP for each dependent covered by the plan, or if PCP selection is optional.
6. Select a Start Date Code that indicates when the selected provider becomes the participant’s primary care provider.
7. Enter the number of times a participant is permitted to change primary care providers per month in the Number of Changes Allowed field.
8. For primary care provider searches, select the maximum Radius in miles which the PCP database should consider when returning the results of a search query.
9. Check the Radius warning field to issue a warning message to the participant indicating that the selected PCP is outside the range
allowed by the plan. Checking this field lets a participant override the warning and select a PCP outside the prescribed range.

Note: If you do not check this field, a participant cannot select a PCP outside the radius.

Note: This warning only occurs in the professional forms user interface, not in Self-Service Benefits.

10. Save your work.

11. Choose the Option Restrictions button to open the Plan Primary Care Provider Restrictions window if the requirements for designating a primary care provider differ between the options in the plan.

Note: For example, if a participant who elects participant only coverage is not required to select a PCP, but a participant who elects employee plus spouse coverage is required to select a PCP for dependent coverage, you would need to specify designation restrictions at the option level, instead of the plan level.

12. Select the option for which you are specifying PCP designation requirements in the Options field.

13. Select a Designation Code to indicate if a participant who enrolls in this option is required to select a PCP, or if PCP selection is optional.

14. Select a Dependent Designation Code to indicate if a participant who enrolls in this option is required to select a PCP for each dependent covered by the plan, or if PCP selection is optional.

15. Save your work and close the Plan Primary Care Provider Restrictions window.

16. Choose the Plan Restrictions button if the requirements for designating a primary care provider for this plan vary based on the primary care provider type (such as Gynecology or Pediatric Medicine) and the age or gender of the benefits participant.

Note: The Plan Restrictions button is only activated if you check the From Repository field.

17. Select a primary care provider type for which you are specifying PCP designation requirements based on the age or gender of the benefits participant.

You maintain primary care provider types using the Lookup Type BEN_PCP_SPCLTY if your primary care providers are stored in an external repository. Use the Lookup Type BEN_PRMRY_CARE_PRVDR_TYP if your PCPs are not stored in a repository.
18. Enter a Minimum Age if the participant must be of a minimum age or older to select this provider type, such as a geriatric care provider.

19. Enter a Maximum Age if the participant must be of a maximum age or younger to select this provider type, such as a pediatric care provider.

20. Select a Gender Allowed Code of Female or Male to restrict the selection of this provider type to one gender, such as female for a gynecology provider.
Configuring the Primary Care Provider Search Facility

As part of a self-service enrollment, a benefits participant can select a primary care provider (PCP) for a benefit plan. As a system administrator, you can configure Self-Service Benefits so that a participant can select a primary care provider through a web-based search of a PCP database.

Self-Service Benefits also supports free form text entry of primary care providers without validation when a repository of PCP data is not used.

Follow the instructions below based on the search type configured by your enterprise.

Setting up an XML-Enabled Primary Care Provider Search

If the search criteria entered by a benefits participant is formatted as an XML search request for use with a database of primary care providers (maintained by your enterprise or a third party), you use the Regions window to configure information such as the URL of the information provider and the Document Type Definition (DTD) used by the search.

Note: Currently, the XML transaction must conform to version 2.0 or 3.0 of the GeoAccess DTD. The DTD version you use should correspond to your Client ID.

To set up an XML-enabled primary care provider search:
1. Query the Region ID BEN_PCP_XML_REQUEST_PARAMS.
2. Click the Region Items button.
3. Select the Ben PCP Provider Information attribute and enter the URL of the information provider in the Long Label field.
   Note: Enter the URL as you would in the Address or Location field of your web browser. Do not enclose the URL in quotations.
4. Select the Ben PCP XML DTD attribute and enter the URL of the XML Document Type Definition in the Long Label field.
5. Select the Ben PCP Info Provider Client ID attribute and enter the Client ID given by the information provider in the Long Label field.
6. If you use a proxy server to access an external web site, select the Ben PCP Server Proxy Set attribute and enter true in the Long Label field.
   • If you do not use a proxy server, enter false.
7. If you use a proxy server, select the Ben PCP Server Proxy Port attribute and enter the port number (typically 80) in the Long Label field.

8. If you use a proxy server, select the Ben PCP Proxy Host attribute and enter the URL of the proxy server in the Long Label field.

9. Select the Ben PCP XML Version attribute and enter the version of XML you are using in the Long Label field, such as 1.0

10. Select the Ben PCP Max Records attribute and enter the maximum number of records to be returned by the query in the Long Label field.

   **Note:** For best performance, it is recommended that the maximum number of records be set to 100 or less.

11. Select the Ben PCP Request Method attribute and enter the HTTP request method expected by the information provider (such as GET or POST) in the Long Label field.

### Setting Up a Primary Care Provider Search without XML Formatting

Customers who create a search page which does not format the PCP query in XML can follow these guidelines for creating a PCP search that is compatible with Self-Service Benefits.

**▶ To set up a primary care provider search without XML formatting:**

1. Open the Regions window.
2. Query the Region ID BEN_PCP_SELECT_SEARCH_TABLE.
3. Click the Region Items button.
4. Select the ICX_IMAGE_FILE_1 attribute and enter the URL in the URL field that is accessed when a participant clicks the Search button on your custom Search web page.
5. A system administrator or application developer creates a search page that performs the query and accepts the following page-context variables:
   - PcpPersonId = (Person ID of the person for whom you are searching for a primary care provider)
   - PcpPlId = (Plan ID defined for the plan in the database)
   - PcpPlTypId = (Plan Type ID defined in the database)

   **Note:** You do not need to use these variables if they are not required for your search or validations.
6. If the search is canceled without a selection of a PCP, the following URL must be used to return to the search page:

   - /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE
     &akRegionApplicationId=805&pcpSearchCancel=1.

   **Note:** Replace the directory OA_HTML with the base HTML directory of your installation.

7. If the search is successful, the URL accessed by the query must return the following information (properly formatted) with the following parameter names and data types:

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Data</th>
<th>Value</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>ExtIdent</td>
<td>ID of the primary care provider per the plan.</td>
<td>Number</td>
<td>10154244 (id)</td>
</tr>
<tr>
<td>PcpName</td>
<td>Name of the primary care provider</td>
<td>String</td>
<td>Sue Jones, MD (doctorsName)</td>
</tr>
<tr>
<td>PcpSpecialty</td>
<td>Specialties of the primary care provider</td>
<td>String</td>
<td>Internal Medicine, Pediatrics (specialty)</td>
</tr>
<tr>
<td>PcpPlId</td>
<td>The plan ID that corresponds to the plan name</td>
<td>Number</td>
<td>905 (planId)</td>
</tr>
<tr>
<td>PcpPersonId</td>
<td>The person ID passed to the database as part of the query</td>
<td>Number</td>
<td>928374655 (personId)</td>
</tr>
<tr>
<td>PcpTypCd</td>
<td>The code of the first primary care provider specialty that is returned by the query</td>
<td>Number</td>
<td>23 (pcpTypCd)</td>
</tr>
</tbody>
</table>

The URL returned by the search should look like this:

   - /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE
     &akRegionApplicationId=805&ExtIdent=id&PcpName=doctorsName&PcpSpecialty=specialty&PcpPlId=planId&PcpPersonId=personId&PcpTypCd=pcpTypCd

   **Note:** Replace the directory OA_HTML with the base HTML directory of your installation and replace the variables in the URL with the actual values.

---

Benefits and Individual Compensation Distributions
Defining Communication Types

You define, update, and delete communication types in the Communication Types window. You complete your communication type definition by defining communication triggers, usages, and delivery information.

To define a communication type:

1. Enter a Name for the communication type you are defining.
2. Optionally, enter a Short Name for this communication type.
   
   **Note:** Short names are also used to maintain instruction text for regions of self-service enrollment web pages. You must enter the short name in the following format: **BEN.REGIONNAME**. Exclude the **BEN** prefix from the regionname portion of short name.

   See: Benefits Enrollments: page 13 – 15 for a list of the required short names for each web page region.

3. Select a To Be Sent code or rule that defines when the communication should be sent relative to a life event or a given point in the enrollment cycle.

4. Select a kit code in the Part of Kit field to specify whether this communication is a single item (a piece), or one of several communication items in a kit.
   
   • Select the kit to which this piece belongs in the Kit Name field if this communication is one piece in a kit.
   
   • View the communication pieces that make up a kit by choosing the View Children button when you have selected a kit.

5. Check the Inspection Required field or select an Inspection Required Rule if this communication must be inspected before it is delivered.

6. Check the Always Send field if this communication should always be sent whenever it is requested or triggered.

   Alternatively, enter the maximum number of times this communication can be sent in the Max Number Available field.

7. Check the Track Mailing field if the system should track the delivery status of this communication.

8. Enter the maximum number of communication that a person can receive of this communication type in the Max Number Available field.
9. Select a Communication Type Rule that further refines the definition of this communication type.

10. Select a Usage type that categorizes this communication.

    Example usage types include Reminder to Act and Confirmation of Action.

    **Note:** Select a usage type of Self Service Instruction Text if you are configuring a self-service web page.

11. Select a Recipient Code that limits the type of benefits participant to whom this communication is being sent, such as a dependent.

12. Enter a Description of this communication.

13. Save your work.
Defining When to Use a Benefits Communication

You use the Communication Type Usages window to define the conditions that generate an extract of communications data.

You also use this window if you are implementing web–based self–service enrollments and you want to write instruction text that appears in a region of a self–service window.

▶ To define a communication usage:

1. Enter or query a communication type in the Communication Types window.
2. Choose the Usages button.
3. Select a value for one or more of the following parameters to limit the conditions under which communications data is generated.
   - Life Event
   - Program
   - Plan
   - Plan Type
   - Enrollment Period
   - Action
4. Select a Usage Rule if your criteria for determining the conditions under which communications data is generated cannot be fully accommodated by the usage criteria on this window.
5. Enter instructional text in the Self Service Description field that corresponds to the region of the self–service web page that you are configuring.
6. Save your work.
Defining Additional Enrollment Action Types (Advanced Benefits)

You use the Enrollment Action Types window to rename an action type delivered with the system. You then link the action type to a program or a plan as part of your enrollment requirements.

You also use this window to edit messages for incomplete action items for Oracle Self-Service Human Resources benefits enrollments.

To define additional enrollment action types:

1. Enter a name for the the enrollment action type you are defining in the Name field.

2. Select an enrollment action type in the Type field to specify a generic action a person must resolve in order to enroll in a compensation object.

3. Enter a description of the enrollment action type in the Description field.

   **Note:** The description text appears as a message when a self-service user is required to complete an action item before an enrollment is valid.

4. Save your work.
Self-Service Individual Compensation Distributions (ICD)

Using Oracle HRMS, you can give managers throughout your enterprise the authority and ability to assign one time or recurring awards, bonuses, and allowances to qualified employees and other individuals using Oracle Self Service Human Resources.

As a compensation manager, you set up individual compensation distribution plans to define the components of an award or allowance. The line manager uses the self service interface to assign the award—setting the start and end date of the distribution—while the back-office maintains control of the plan’s administration.

You can also configure employee self-service ICD for use by non-manager employees. For example, if your enterprise offers a charitable contribution plan or a savings bond plan to which employees contribute at their own discretion, you can enable the contribution through the self service interface.

Using elements, you can process the distributions through Oracle Payroll. For recurring distributions, you can define the distribution end date, or, using FastFormula, enforce the total maximum distribution you allow in a period.

Security features in Oracle HRMS ensure that managers can assign a distribution only to employees and contractors within their security group. Participant eligibility profiles offer a further way to limit distributions to eligible employees based on a range of criteria, such as assignment data.

Oracle Self Service HR seeds a workflow approval process that automatically sends a notification to the supervisor of the manager who distributes the award. The manager’s supervisor can either approve or reject the distribution.

Setting Up Individual Compensation Distribution Plans for Self-Service Human Resources

Follow these process steps to set up a variety of individual compensation distribution plans, such as:

- Periodic or spot bonuses
- Sponsored allowances
- Resettlement compensation
- Severance Payments
- Other periodic or recurring awards
As a compensation and benefits administrator, you define an individual compensation distribution plan using the features of Oracle Standard Benefits or Oracle Advanced Benefits.

Once you define the compensation plan, a line manager issues the compensation distribution to the employee through Oracle Self Service Human Resources.

See the following topics for more information on setting up ICD:
• Define the Individual Distribution Compensation Plan: page 13 – 41
• Define Enrollment Requirements for the Plan: page 13 – 43
• Set Up Activity Rates and Coverages for the Plan: page 13 – 44
• Configuring ICD Web pages: page 13 – 47
• Entering People for Test Purposes: page 13 – 47
• Setting Up Employee Self-Service Access to ICD: page 13 – 48

Define the Individual Distribution Compensation Plan

You set up an individual compensation distribution plan by defining the characteristics of the plan and any electable options in the plan. If necessary, you can define participant eligibility profiles to limit the participants who are eligible for the plan or option.

### Setting up self-service individual compensation distribution plans

1. Define the Plan Year start and end dates for the compensation plan. Set up several plan years to account for future plan years.
   See: Defining a Program or Plan Year Period, (Managing Total Compensation Using Oracle HRMS)

2. Optional: define a participant eligibility profile to control eligibility for the compensation plan.
   If you do not define a participant eligibility profile, the application finds all employees and contractors reporting to the manager eligible for the distribution.
   
   **Note:** Set the participant eligibility profile status to active if you define a profile.
   See: Defining an Eligibility Profile, (Managing Total Compensation Using Oracle HRMS)

3. Set up one or more Plan Types to group the compensation plans you administer.
   • Required: select an Option Type of Individual Compensation Distribution to enable a manager to distribute the award through the self-service interface.
• Optional: select a Compensation Category of Compensation for reporting purposes or for system extracts.

You can choose to set up a single plan type for all your compensation plans, or you can define multiple plan types for groupings of plans (Bonus, Allowance, Severance, and others).

**Note:** You should base the number of plan types you define on your reporting requirements.

See: Defining Plan Types, *(Managing Total Compensation Using Oracle HRMS)*

4. Optional: define the options in the compensation plan.
   - Enter a user friendly option name to display in the self-service web page.
   - Select the corresponding plan type of each option.
   **Note:** Use options when there is a logical grouping of choices within a plan, such as a car allowance plan with options of BMW, Honda, and Ford. For bonus plans, severances, and allowances, set up each compensation type as a separate plan.

See: Defining Options,

5. Define the individual distribution compensation plan.
   - Enter a user friendly plan name to display in the self-service web page.
   - Select the plan type of the plan.
   - Set the plan status to active. You can update the status to inactive if you need to temporarily disable the plan.
   - Select a Plan Usage code of May Not Be In a Program.

In the Not in Program tabbed region:
   - Enter a sequence number that indicates the order in which the plan displays in the self-service web page relative to other plans in the plan type.
   - Select the currency of the plan for monetary distributions. You do not enter a currency for non-monetary allowances, such as cars.
   - Select the Activity Reference Period of the plan. For recurring awards, the activity reference period is the period the manager sees when distributing the award, for example, $100 per period.

For non-recurring awards, you can select any activity reference period.
See: Defining a Benefits Plan, (Managing Total Compensation Using Oracle HRMS)

6. Link the Plan Years to the plan that you defined in Step 1.
   See: Maintaining Plan Related Details, (Managing Total Compensation Using Oracle HRMS)

7. If you defined options in Step 4, link the options to the plan.
   - Set the status for each option to active. You can update the status to inactive if you need to temporarily disable an option.
   See: Associating Options with a Plan, (Managing Total Compensation Using Oracle HRMS)

8. Link a participant eligibility profile to the plan if you limit eligibility for the plan.

Define Enrollment Requirements for the Plan

You use the Plan Enrollment Requirements window to control the enrollment method for an individual compensation distribution plan. You can also set up required certifications that the individual must provide before Oracle Payroll distributes the award.

To define plan enrollment requirements:

1. Define enrollment requirements for the plan.
   - Query the plan you defined in step 5 above.
   - Select an enrollment method of Explicit.
   - Check the Allows Unrestricted Enrollment check box.
   - If you define coverages, select a Coverage Start Date code of Enterable if you want to let the manager enter the coverage start date. The application distributes the award to Payroll following the date. If you do not want the manager to enter the start date, select any other coverage state date code.
   - Select a Coverage Start Date code of Event to set the start date to the system date when the manager enters the self-service web page. Use this code for non-recurring awards. The application distributes the award to Payroll in the following payroll period.
   - Required: select a Coverage End Date code that corresponds to your Coverage Start Date code.
   - Activity Rate Start and End Date codes function similarly to coverage codes. Choose Enterable for recurring allowances; for non-recurring allowances, choose Event.
See: Defining Enrollment Requirements for Not in Program Plans, (Managing Total Compensation Using Oracle HRMS)

2. Optional: for Advanced Benefits users, link one or more certifications to the plan if you request or require certification from the participant before you make the distribution.

Oracle HRMS seeds the certification types available with the application.

**Note:** If you require a certification, the application suspends the payroll distribution of the award until the participant returns the certification. A message displays to the issuing manager indicating that the distribution is suspended.

See: Defining Certifications for Enrollment in a Plan, (Managing Total Compensation Using Oracle HRMS)

See: Defining an Action Item Due Date (Advanced Benefits), (Managing Total Compensation Using Oracle HRMS)

3. Optional: for Advanced Benefits, you can define communication types that the application generates to inform the participant of a suspended distribution.

You set up a system extract to write the applicable information from the communication type to a text file. You can then merge the data from the text file into the body of the participant communication.

See: Defining Communication Types, (Managing Total Compensation Using Oracle HRMS)

**Set Up Activity Rates and Coverages for the Plan**

You set up activity rates to define the amount of a distribution (for fixed rate distributions) or to indicate that the manager enters the distribution amount when the award is assigned in the self-service web page.

**Note:** You can set up multiple activity rates for an ICD plan; however, you can choose only one rate to display on enrollment to the self-service user.

**To set up activity rates for a plan:**

1. Optional: set up an activity rate for an individual compensation distribution plan or option in the following cases:
   - You do not use coverages.
   - You offer a monetary award and you want to distribute the amount of the award to payroll.
• You create element entries for the award.
• You award a non-monetary gift (defined as a coverage) and you need to keep records of the taxable benefit.
• You want to control the maximum amount that can be distributed for a recurring element.

  **Note:** In order to control the maximum distribution amount, you must configure Oracle Payroll using FastFormula.

Follow these guidelines when setting up the activity rate:

• Set the activity rate status to active.
• Indicate if the activity rate applies to a plan or to an option in a plan.
• Select any Activity Type code.
• Select a Usage code of Standard Contribution/Distribution.
• Select a Unit of Measure if the award is non-monetary.

  **Note:** If the Unit of Measure is monetary, do not select any unit of measure.

Define the calculation method for the activity rate.

• If the award is a flat amount, enter the value of the award.
• If the award is not a flat amount, check the Enter Value at Enrollment check box. For recurring awards, the value the manager enters at enrollment is per the activity reference period defined for the plan.
• Check the Assign on Enrollment and Display on Enrollment check boxes.

  See: Defining Activity Rates for a Standard Contribution/Distribution, *(Managing Total Compensation Using Oracle HRMS)*

2. Optional: define a variable rate profile if the activity rate varies according to one or more factors, such as the assignment of the person to whom the manager distributes the award.

You can also use variable rate profiles to minimum and maximum distributions, increments, and default rates.

  See: Defining General Information for a Variable Rate Profile, *(Managing Total Compensation Using Oracle HRMS)*

3. Optional: create a taxable benefit rate for use with non-monetary coverages.
You set up a taxable benefit rate for non-monetary coverages like you define a standard activity rate, with the following exceptions:

- Leave the Unit of Measure field blank.
- Select a Calculation Method of Multiple of Coverage.
- Uncheck the Enter Value at Enrollment field.
- Define a multiplier where the number represents the value of one non-monetary award.
- Select a Coverage Operator of Multiply by.
- Select a Rounding Code of Round to Nearest Hundredth.
- Uncheck the Display on Enrollment check box.

Note: You may have to define your coverage first before saving this rate.

4. Optional: create a Maximum Distribution Rate to accompany the standard rate.

You set up a Maximum Distribution Rate like you define a standard activity rate, with the following exceptions:

- Select an Activity Type of Total Distribution Limit.
- Leave the Unit of Measure field blank.
- Leave the Recurring field blank.

5. Optional: define coverages for the plan if:

- The award is non-monetary and you do not want element entries created for the non-monetary award.
- The award is a non-monetary gift (which is defined as a coverage) and you need to keep records of the taxable benefit.
- You do not define standard activity rates.

See: Defining a Coverage Calculation, (Managing Total Compensation Using Oracle HRMS)

Follow these guidelines when you set up a coverage definition:

- Enter a name for the coverage.
- Select a coverage type.
- Select a Unit of Measure if the Type is not Coverage.
- On the Calculation Method Tab, select a Calculation Method of Flat Amount.

Note: If you want the user to enter the value during the enrollment check the Enter Value at Enrollment check box. Otherwise, enter the amount.
• For recurring distributions, the coverage amount is per the activity reference period defined in the plan.

    Note: You should set up no more than one coverage per compensation plan or option.

Configuring ICD Web pages

You use the Application Dictionary to configure the field labels, hints, tips, and messages that display in an ICD web page.

You can also configure menu names, function names, and certain workflow attributes.

See: Individual Compensation Distributions (ICD): page 13 – 50

Entering People for Test Purposes

You can enter sample people into the Oracle HRMS database to test your Individual Compensation Distribution plan.

**Define a Manager:**

1. Using the People window, define a manager with a date of birth, social security number, and address.
2. Enter an Assignment for the manager.
3. Check the Manager check box located in the Miscellaneous tabbed region.
4. Select the manager’s GRE in the GRE tabbed region.

**Define an Employee:**

1. Using the People window, define an employee with a date of birth, social security number, and address.
   
   Note: If you use eligibility profiles, make sure the test employee meets your eligibility requirements.
2. Enter an Assignment for the employee.
3. Select the test manager you created as the employee’s supervisor on the Supervisor tabbed region.
4. Select the employee’s GRE in the GRE tabbed region.

**Create a User Name and Password for the Test Manager:**

1. As a system administrator, open the User Types window to define a user name and password for the manager you created.
2. Link the Manager Self Service responsibility to the user name.
3. Save your work and close the window.
Assign an Individual Compensation Distribution to the Employee:

1. Using the manager’s user name and password, log on to Oracle Self Service HR.
2. Choose the Individual Compensation menu item.
3. Find the Employee you created.
4. Assign the individual an award.

Setting Up Employee Self–Service Access to ICD

You can configure ICD for employee self–service access. Use this feature if your enterprise administers charitable contribution plans, savings bond plans, or service recognition plans where you allow the employee to select from one or more awards.

Note: You set up employee self–service plans as you would other plans, using the professional user interface. However, you should include employee self–service plans in their own plan type, so that participants cannot view plans only available to managers.

To set up employee self–service access to ICD:

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Enter a new function name—without spaces—in the Function field.
4. Enter a User Function Name for this function.
5. Select SSWA JSP Function as the function Type.
6. Optional: enter a Description of the function.
7. Choose the Form tab.
8. Enter the following parameter, substituting the function name you entered in Step 3 and your plan type IDs where indicated:
   • pProcessName=HR_INDIVIDUAL_COMP_PRC&pItemType=HR_SSA&pCalledFrom=<your new function code>&PLANTYPE=<your plan type IDs separated by commas>
9. Choose the Web HTML tab.
10. Enter the following string in the HTML Call field:
    • OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800

Implementing Oracle Self-Service Human Resources 4.0
11. Save your work.
12. Close the Form Functions window and open the Menus window.
13. Add the function you just created to the Employee Self-Service Menu.
14. Save your work.
**Individual Compensation Distributions (ICD)**

The Individual Compensation Distributions (ICD) module enables supervisors to manager compensation distributions throughout the enterprise. They can also assign one–time and recurring awards, bonuses, and allowances to employees. The Benefits or Compensation administrator needs to define the individual compensation distribution plans using Oracle Advanced Benefits or Oracle Standard Benefits.

See: Self-Service Individual Compensation Distributions: page 13 – 40

**Menu and Function Names**

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self Service</td>
<td>Individual Compensation Distributions</td>
</tr>
</tbody>
</table>

See: Defining User Access and Menus: page 5 – 12

**Workflow**

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Compensation Distribution

**Configurable Workflow Attributes:**

Not applicable

**Configurable Web Applications Dictionary Regions:**

The following definitions can be configured in the Configuration Framework:

**Regions**

**ICD Plan Selection Page**

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_PLAN_SELECTION_PAGE</td>
<td>Plan Selection</td>
</tr>
<tr>
<td>BEN_PLAN_SELECTION_CONTENT</td>
<td>Comp Plan Selection</td>
</tr>
<tr>
<td>BEN_COMP_PLAN_TABLE</td>
<td>Comp Plan Selection Table</td>
</tr>
</tbody>
</table>

13 – 50 Implementing Oracle Self-Service Human Resources 4.0
### ICD Update Mode Selection Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_COMP_UPD_MODE_PAGE</td>
<td>Compensation Update Mode Selection Page</td>
</tr>
<tr>
<td>BEN_COMP_UPD_MODE_CONTENT</td>
<td>Compensation Update Mode Selection Content</td>
</tr>
</tbody>
</table>

### ICD Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_COMP_DETAILS_PAGE</td>
<td>Compensation Details</td>
</tr>
<tr>
<td>BEN_COMP_DETAILSCONTENT</td>
<td>Compensation Details Content</td>
</tr>
</tbody>
</table>

### ICD Review Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_COMP_REVIEW_CONTENT_SS</td>
<td>Compensation Review Content</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

### Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN_PLAN_SELECTION_CONTENT</td>
<td>Comp Plan Selection</td>
<td>HR Instruction</td>
<td>Benefits Communication Type</td>
<td>CPS_PLAN_SELECTION_CONTENT</td>
</tr>
<tr>
<td>BEN_COMP_UPD_MODE_CONTENT</td>
<td>Compensation Update Mode Selection Content</td>
<td>HR Instruction</td>
<td>Long Message</td>
<td>BEN_92737_COMP_UPD_MD_INST</td>
</tr>
<tr>
<td>Region ID</td>
<td>Region Name</td>
<td>Attribute Name</td>
<td>Tip Type</td>
<td>Message Name</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------------------------</td>
<td>----------------------</td>
<td>-------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>BEN_COMP_DETAILS_CONTENT</td>
<td>Compensation Details Content</td>
<td>HR Instruction</td>
<td>Benefits Communication Type</td>
<td>CPD_COMP_DETAILS_CONTENT</td>
</tr>
<tr>
<td>BEN_COMP_REVIEW_CONTENT_SS</td>
<td>Compensation Review Content</td>
<td>HR Instruction</td>
<td>Benefits Communication Type</td>
<td>(Review Page): CPC_COMP_CONFIRM_CONTENT</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(Confirmation Page): CPR_COMP_REVIEW_CONTENT</td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

**FlexFields:**

Not applicable

**Configurable Profile Options**

Not applicable
CHAPTER 14

Self-Service Payroll
Overview of Payroll Functions

SSHR currently includes the following payroll functions:

- Online Payslip
- Personal Payment Methods
- Online Tax Form

The following section gives technical information on configuring the generic versions of these functions. You should note, however, that these functions are generally localized and you should see the relevant documentation for your localization for additional implementation and configuration information.
Payment Methods

The Payroll Payments module enables employees to specify how they wish their salary to be paid by dividing an employee’s net pay into one or more payments. Each payment is of a particular type (cash, check, deposit) and has an associated amount and a priority. The payments are made in order of priority. SSHR always uses the lowest priority payment to pay any net pay remaining after all the other payments have been made. It is also possible that low priority payments may not receive all (or any) or their allotted funds because of the amounts used to process higher priority payments.

A typical use of this function occurs if an employee wants to split the net pay so that $100 is paid into a savings account and the rest is paid into a current account. The employee can subsequently change the amount paid into the savings account if required.

You can apply configuration options to determine:

- whether employees can use the module for multiple payments
- whether payment information is for viewing only
- which types of payments the employee can select (cash, check, deposit, or a combination)
- how the payment amounts are defined (percentage of net pay or a monetary amount)
- the maximum number of payments an employee can set up
- which organization payment methods are used

If you configure Payment Methods so that employees can edit their payments, they can carry out the following steps:

- create new payments
- update existing payments
- delete payments
- change the priorities for payments

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Self Service V4.0</td>
<td>Manage Payroll Payments V4.0</td>
</tr>
</tbody>
</table>

See: Defining Menus for SSHR: page 5 – 12
Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Payroll Payments V4.0

**Note:** The Process Payroll Payments module does not support approvals.

Configurable Workflow Attributes:

<table>
<thead>
<tr>
<th>Process Display Name</th>
<th>Function Activity Display Name</th>
<th>Function Activity Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Payroll Payments V4.0</td>
<td>Manage Payroll Payments V4.0</td>
<td>View Only</td>
</tr>
<tr>
<td>Process Payroll Payments V4.0</td>
<td>Manage Payroll Payments V4.0</td>
<td>Permitted Payment Types</td>
</tr>
<tr>
<td>Process Payroll Payments V4.0</td>
<td>Manage Payroll Payments V4.0</td>
<td>Maximum Payment Methods</td>
</tr>
<tr>
<td>Process Payroll Payments V4.0</td>
<td>Manage Payroll Payments V4.0</td>
<td>Permitted Amount Types</td>
</tr>
<tr>
<td>Process Payroll Payments V4.0</td>
<td>Manage Payroll Payments V4.0</td>
<td>Deposit Payments List</td>
</tr>
<tr>
<td>Process Payroll Payments V4.0</td>
<td>Manage Payroll Payments V4.0</td>
<td>Cash Payments List</td>
</tr>
<tr>
<td>Process Payroll Payments V4.0</td>
<td>Manage Payroll Payments V4.0</td>
<td>Cash Payments List</td>
</tr>
</tbody>
</table>

**View Only**

Specifies whether the employee can edit the payments information. The default value enables editing.

**Permitted Payment Types**

Specifies which types of payment methods an employee can create. The available payment types are cash, check, and deposit. The default value allows the employee to create any of the three payment types.

**Maximum Payment Methods**

Specifies the maximum number of payments that an employee can create (up to 10). The default value is 5.
Permitted Amount Types

Specifies the amount types for payments. The payment amount can be a monetary amount or a percentage of net pay. The default value enables both amount types.

Deposit Payments List

This attribute is only used if you have enabled deposit payments. This attribute stores a list of Organizational Payment Method (OPM) names that can be used to create a deposit payment. The OPM names are separated by a vertical bar (|). The module uses the first match to a deposit OPM name (for the employee’s payroll) when new deposit payments are created. For example, East_Coast_NACHA | West_Coast_NACHA.

Cash Payments List

This is used in the same way as the Deposit Payments Checklist but for cash payments.

Check Payments List

This is used in the same way as the Deposit Payments Checklist but for check payments.

Note: The administrator must set at least one of Deposit Payments List, Cash Payments List, or Check Payments List.

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Definitions for Web Applications Dictionary:

The following definitions can be configured in the Web Applications Dictionary:

Regions

Summary and Edit Pages

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_PAYMENTS_TOP_SS</td>
<td>Payroll Payments Top</td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_SS</td>
<td>Payroll Payments Edit</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_SS</td>
<td>Payroll Payments Summary</td>
</tr>
<tr>
<td>PAY_PAYMENTS_LABELS_SS</td>
<td>Payroll Payments Labels</td>
</tr>
<tr>
<td>Region Code</td>
<td>Region Name</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>PAY_PAYMENTS_REVIEW_SS</td>
<td>Payroll Payments Review</td>
</tr>
</tbody>
</table>

## Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
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</thead>
<tbody>
<tr>
<td>PAY_PAYMENTS_EDIT_INS1_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 1</td>
<td>Pay</td>
<td>PAY_PSSV4_ADD_CASH_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Create Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS1_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 2</td>
<td>Pay</td>
<td>PAY_PSSV4_ADD_CHECK_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Create Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS1_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 3</td>
<td>Pay</td>
<td>PAY_PSSV4_ADD_CHEQUE_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Create Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS1_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 4</td>
<td>Pay</td>
<td>PAY_PSSV4_ADD_DEPOSIT_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Create Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS1_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 5</td>
<td>Pay</td>
<td>PAY_PSSV4_ADD_REMAINING_PAY</td>
</tr>
<tr>
<td></td>
<td>Edit Create Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS2_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 1</td>
<td>Pay</td>
<td>PAY_PSSV4_UPDATE_CASH_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Update Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS2_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 2</td>
<td>Pay</td>
<td>PAY_PSSV4_UPDATE_CHECK_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Update Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS2_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 3</td>
<td>Pay</td>
<td>PAY_PSSV4_UPDATE_CHEQUE_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Update Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS2_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 4</td>
<td>Pay</td>
<td>PAY_PSSV4_UPDATE_DEPOSIT_OVERRVIEW</td>
</tr>
<tr>
<td></td>
<td>Edit Update Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS2_SS</td>
<td>Payroll Payments</td>
<td>Pay Instruction 5</td>
<td>Pay</td>
<td>PAY_PSS_REMAINING_PAY</td>
</tr>
<tr>
<td></td>
<td>Edit Update Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Region ID</td>
<td>Region Name</td>
<td>Attribute Name</td>
<td>Tip Type</td>
<td>Message Name</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------------</td>
<td>------------------------</td>
<td>------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS3_SS</td>
<td>Payroll Payments Edit View–only Mode Instructions</td>
<td>Pay Instruction 1</td>
<td></td>
<td>PAY_PSSV4_DETAILS_OVERVIEW</td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS3_SS</td>
<td>Payroll Payments Edit View–only Mode Instructions</td>
<td>Pay Instruction 2</td>
<td></td>
<td>PAY_PSSV4_DETAILS_OVERVIEW</td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS3_SS</td>
<td>Payroll Payments Edit View–only Mode Instructions</td>
<td>Pay Instruction 3</td>
<td></td>
<td>PAY_PSSV4_DETAILS_OVERVIEW</td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS3_SS</td>
<td>Payroll Payments Edit View–only Mode Instructions</td>
<td>Pay Instruction 4</td>
<td></td>
<td>PAY_PSSV4_DETAILS_OVERVIEW</td>
</tr>
<tr>
<td>PAY_PAYMENTS_EDIT_INS3_SS</td>
<td>Payroll Payments Edit View–only Mode Instructions</td>
<td>Pay Instruction 5</td>
<td></td>
<td>PAY_PSS_REMAINING_PAY</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_INS1_SS</td>
<td>Payroll Payments Summary Edit Mode Instructions</td>
<td>Pay Instruction 1</td>
<td></td>
<td>PAY_PSSV4_SUMMARY_EDIT_OVERVIEW</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_INS1_SS</td>
<td>Payroll Payments Summary Edit Mode Instructions</td>
<td>Pay Instruction 2</td>
<td></td>
<td>PAY_PSS_EDIT_DFLT_MANDATORY_PAY</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_INS1_SS</td>
<td>Payroll Payments Summary Edit Mode Instructions</td>
<td>Pay Instruction 3</td>
<td></td>
<td>PAY_PSS_EDIT_DFLT_CASH</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_INS1_SS</td>
<td>Payroll Payments Summary Edit Mode Instructions</td>
<td>Pay Instruction 4</td>
<td></td>
<td>PAY_PSS_EDIT_DFLT_CHECK</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_INS1_SS</td>
<td>Payroll Payments Summary Edit Mode Instructions</td>
<td>Pay Instruction 5</td>
<td></td>
<td>PAY_PSS_EDIT_DFLT_CHEQUE</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_INS2_SS</td>
<td>Payroll Payments Summary View–only Mode Instructions</td>
<td>Pay Instruction 1</td>
<td></td>
<td>PAY_PSSV4_SUMMARY_VIEW_OVERVIEW</td>
</tr>
<tr>
<td>PAY_PAYMENTS_SUMMARY_INS2_SS</td>
<td>Payroll Payments Summary View–only Mode Instructions</td>
<td>Pay Instruction 2</td>
<td></td>
<td>PAY_PSS_MANDATORY_PAY</td>
</tr>
<tr>
<td>Region ID</td>
<td>Region Name</td>
<td>Attribute Name</td>
<td>Tip Type</td>
<td>Message Name</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------</td>
<td>---------------------------------</td>
<td>------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>PAY_PAYMENTS</td>
<td>Payroll Payments</td>
<td>Summary View – only Mode</td>
<td>Pay Instruction 3</td>
<td>PAY_PSS_CASH_SALARY</td>
</tr>
<tr>
<td><em>SUMMARY_INS</em></td>
<td></td>
<td>View – only Mode</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2_SS</td>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pay Instruction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PAY_PSS_CASH_SALARY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS</td>
<td>Payroll Payments</td>
<td>Summary View – only Mode</td>
<td>Pay Instruction 4</td>
<td>PAY_PSS_CHECK_SALARY</td>
</tr>
<tr>
<td><em>SUMMARY_INS</em></td>
<td></td>
<td>View – only Mode</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2_SS</td>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pay Instruction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PAY_PSS_CHECK_SALARY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS</td>
<td>Payroll Payments</td>
<td>Summary View – only Mode</td>
<td>Pay Instruction 5</td>
<td>PAY_PSS_CHEQUE_E_SALARY</td>
</tr>
<tr>
<td><em>SUMMARY_INS</em></td>
<td></td>
<td>View – only Mode</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2_SS</td>
<td></td>
<td>Instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pay Instruction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PAY_PSS_CHEQUE_E_SALARY</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>FlexField Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_PAYMENTS_E</td>
<td>Payroll Payments</td>
<td>Employee Table</td>
<td>BANK Bank Details</td>
</tr>
<tr>
<td>EMPLOYEE_TABLE_</td>
<td></td>
<td>PAY_BANK_KEY_FLEX</td>
<td>Key Flexfield</td>
</tr>
<tr>
<td>SS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY_PAYMENTS_E</td>
<td>Payroll Payments</td>
<td>Edit Details</td>
<td>BANK Bank Details</td>
</tr>
<tr>
<td>EDIT_DETAILS_SS</td>
<td></td>
<td>PAY_BANK_KEY_FLEX</td>
<td>Key Flexfield</td>
</tr>
<tr>
<td>PAY_PAYMENTS_R</td>
<td>Payroll Payments</td>
<td>Review</td>
<td>BANK Bank Details</td>
</tr>
<tr>
<td>REVIEW_SS</td>
<td></td>
<td>PAY_BANK_KEY_FLEX</td>
<td>Key Flexfield</td>
</tr>
</tbody>
</table>

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Levels</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR:Payroll Payments Self-Service Enable</td>
<td>Site</td>
<td>Yes/No</td>
<td>No</td>
</tr>
<tr>
<td>Multiple Assignments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

14 – 8 Implementing Oracle Self-Service Human Resources 4.0
HR:Payroll Payments Self-Service Enable Multiple Assignments

Specifies whether the employee can use the function to define payments for multiple assignments. The default value only permits payments for the primary assignment.

See: User Profiles (Oracle HRMS Applications User Guide)
Online Payslip

The Payslip module enables employees to view an electronic payslip for a pay period. Employees can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the Next or Back button.

**Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the employee’s primary assignment. Once the employee has logged into the application and clicks on the View Payslip option, the employee will see an electronic version of their payslip based on their primary assignment and the last pay period that has been processed.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Self Service V4.0</td>
<td>Payslip V4.0</td>
</tr>
</tbody>
</table>

See: Defining Menus for SSHR: page 5 – 12

Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:** Not applicable

**Configurable Workflow Attributes:** Not applicable

**Configurable Web Applications Dictionary Regions:**

The following definitions can be configured in the Configuration Framework:

Regions

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_AC_PAYSLP_CUR_YTD_SS</td>
<td>Pay AC Payslip Current and YTD</td>
</tr>
<tr>
<td>PAY_AC_PAYSLP_HOUR_EARN_SS</td>
<td>Pay AC Payslip Earning and Hours</td>
</tr>
</tbody>
</table>
### Region Code vs Region Name Table

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_AC_PAYSLIP_SUMMARY_SS</td>
<td>Pay AC Payslip Summary</td>
</tr>
<tr>
<td>PAY_PAYSLIP1_SS</td>
<td>Pay Payslip Region 1</td>
</tr>
<tr>
<td>PAY_PAYSLIP2_SS</td>
<td>Pay Payslip Region 2</td>
</tr>
<tr>
<td>PAY_PAYSLIP3_SS</td>
<td>Pay Payslip Region 3</td>
</tr>
<tr>
<td>PAY_PAYSLIP4_SS</td>
<td>Pay Payslip Region 4</td>
</tr>
<tr>
<td>PAY_PAYSLIP_EE_ADDR_CELL1_SS</td>
<td>Pay Payslip Ee Addr Cell1</td>
</tr>
<tr>
<td>PAY_PAYSLIP_EE_ADDR_CELL3_SS</td>
<td>Pay Payslip Ee Addr Cell3</td>
</tr>
<tr>
<td>PAY_PAYSLIP_ER_ADDR_CELL1_SS</td>
<td>Pay Payslip Er Addr Cell1</td>
</tr>
<tr>
<td>PAY_PAYSLIP_ER_ADDR_CELL3_SS</td>
<td>Pay Payslip Er Addr Cell3</td>
</tr>
<tr>
<td>PAY_PAYSLIP_NET_PAY_SS</td>
<td>Pay Payslip Net Pay Distribution</td>
</tr>
<tr>
<td>PAY_PAYSLIP_OTHER_INFO_SS</td>
<td>Pay Payslip Other Info</td>
</tr>
<tr>
<td>PAY_PAYSLIP_OTHER_INFO_TABLE_SS</td>
<td>Pay Payslip Other Info Table</td>
</tr>
<tr>
<td>PAY_PAYSLIP_PAYPRD_SALARY_SS</td>
<td>Pay Payslip Pay Period Salary</td>
</tr>
<tr>
<td>PAY_PAYSLIP_PRSN_INFO_TBL1_SS</td>
<td>Pay Payslip Person Info Tbl1</td>
</tr>
<tr>
<td>PAY_PAYSLIP_PRSN_INFO_TBL2_SS</td>
<td>Pay Payslip Person Info Tbl2</td>
</tr>
<tr>
<td>PAY_PAYSLIP_RATE_DETAILS_SS</td>
<td>Pay Payslip Rate Details</td>
</tr>
<tr>
<td>PAY_US_PAYSLIP_TAX_WHOLD_SS</td>
<td>Pay US Payslip Tax Wholding Info</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4

### Tips and Instructions

Not applicable

### FlexFields:

Not applicable

### Configurable Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Level</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR:View Payslip From Date for WEB (MM/DD/YYYY)</td>
<td>User specification</td>
<td>Date</td>
<td>01/01/1997</td>
</tr>
</tbody>
</table>

Self–Service Payroll 14 – 11
HR:View Payslip From Date for WEB

This profile option determines how many payroll periods an employee can view in the online payslip. If the profile option is not set, an error message is displayed when the employee attempts to view the online payslip.

See: User Profiles (Oracle HRMS Applications User Guide)
Online Tax Form

The Online Tax Form module enables employees to make changes to their W4 tax information. When an employee makes changes to the Federal information, all the states that follow the Federal information are also updated, unless the filing status, number of allowances, or exempt status are different.

If an employee claims tax exemption or has allowances that exceed the state limit, the HR/Payroll representative receives a notification and can review the data. If the HR/Payroll representative makes any changes to the data, the employee receives a notification.

Menu and Function Names

This module can be accessed from the following menus and functions:

<table>
<thead>
<tr>
<th>User Menu Name</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Self Service</td>
<td>Online Tax Forms V4.0</td>
</tr>
</tbody>
</table>

See: Defining Menus for SSHR: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:
Change W4 Information JSP PRC

Configurable Workflow Attributes:
Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Tax Form Overview Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_W4_OVERVIEW_SS</td>
<td>W4 Overview Header</td>
</tr>
<tr>
<td>PAY_W4OVERVIEW_SS_FED_CELL1</td>
<td>W4 Overview Fed Detail Cell1</td>
</tr>
</tbody>
</table>
### Tax Form Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_W4_UPDATE_SS_HEADER</td>
<td>W4 Review Region</td>
</tr>
</tbody>
</table>

### Tax Form Update Page

<table>
<thead>
<tr>
<th>Region Code</th>
<th>Region Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_W4_UPDATE/footer</td>
<td>Pay W4 Update Footer</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_AGREEMENT</td>
<td>W4 Update Agreement</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_AGREE_ROW</td>
<td>W4 Update Agree Row</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_AGREE_TABLE</td>
<td>W4 Update Agree Table</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_EXEMPT</td>
<td>W4 Update Exempt</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_EXEMPT_ROW</td>
<td>W4 Update Exempt Row</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_EXEMPT_TABLE</td>
<td>W4 Update Exempt Table</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_FILING_DETAIL</td>
<td>W4 Update Filing Detail</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_TOP</td>
<td>Update</td>
</tr>
</tbody>
</table>

See: Configuring Web Pages: page 7 – 4
Tips and Instructions

<table>
<thead>
<tr>
<th>Region ID</th>
<th>Region Name</th>
<th>Attribute Name</th>
<th>Tip Type</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY_W4_OVERSEW_SS</td>
<td>W4 Overview</td>
<td>Information</td>
<td>Text</td>
<td>PAY_W4_OVIEW_MSG</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_FILING_DETAIL</td>
<td>W4 Update</td>
<td>Information</td>
<td>Line5</td>
<td>PAYSSW4_UPDATE_HEADER_INFO</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_EXEMPT</td>
<td>W4 Update Exempt</td>
<td>Information</td>
<td>Line9</td>
<td>PAY_US_OTF_W4_EXEMPT Tân primary_message</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_AGREEMENT</td>
<td>W4 Update Agreement</td>
<td>Information</td>
<td>Line10</td>
<td>PAY_US_OTF_W4_AGREEMENT_INFO</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_FILING_DETAIL</td>
<td>W4 Update</td>
<td>Allowances</td>
<td>Long Message</td>
<td>PAY_US_OTF_W4_ALLOWANCES_TXT</td>
</tr>
<tr>
<td>PAY_W4_UPDATE_SS_FILING_DETAIL</td>
<td>W4 Update</td>
<td>Additional</td>
<td>Amount</td>
<td>PAY_US_OTF_W4_ADDITION_MOUN_CLASS_TXT</td>
</tr>
</tbody>
</table>

See: Adding Instructions to a Web Page: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Configurable Level</th>
<th>Values</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR: Online Tax Forms Update Method</td>
<td>Site</td>
<td>All, None, Primary</td>
<td>Primary</td>
</tr>
<tr>
<td>HR: HR/Payroll Representative Source</td>
<td>Site</td>
<td>Custom PL/SQL, GRE Contact Information, Further Payroll Information</td>
<td>Further Payroll Information</td>
</tr>
</tbody>
</table>

See: User Profiles (Oracle HRMS Applications User Guide)
Implementation Steps
Implementation Steps for Self-Service HR (SSHR)

SSHR is supplied with predefined data and functionality, although you must configure this data and functionality for your own implementation of SSHR.

Functions in the areas of Appraisals, Candidate Offers, Suitability Matching, and Oracle Training Administration (OTA) have not yet been migrated to the new technology framework for SSHR version 4.0. For information on these functions, please see Implementing Self-Service Human Resources (SSHR) 3.4 (11i.2) which is available on Metalink.

**Note:** If you try to configure functionality before you are familiar with Oracle HRMS and Oracle Workflow, you may make mistakes. Before you complete any step, read the referenced topic information.

**Note:** It is your responsibility to populate data fields.

To Prepare the Environment for SSHR:

1. Ensure that Oracle Human Resources 11i is installed with the most up-to-date patch according to the readme file for SSHR at the time of installation.
2. Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the *Oracle Self-Service Web Applications Implementation Manual* (available on Metalink).
3. Apply the patch for SSHR 4.x and make sure that all prerequisites are met, including those for the OSSWA Framework.
4. Complete the install and set-up of the OSSWA Framework.
   
   See: *Configuring and Troubleshooting Oracle HTTP Server with Oracle Applications* (available on Metalink – technical note number: 139863.1)

5. If you have licensed SSHR, set the following profile option to “Yes” at the site level.
   - HR: Self Service HR Licensed

   If you have not licensed SSHR, please contact Oracle for information on purchasing a licence.

6. Check that you have the correct Internet browser. You can use Netscape Navigator 4.08 or Microsoft Internet Explorer version 4 or 5.
Note: Advise your users that they should not use the Forward and Back options in their Internet browser. They should use the SSHR application to navigate between pages.

7. Ensure that your browsers do not cache Web pages and that they keep the cache size as small as possible. Your browser must reload Web pages on each access. To do this in Netscape Navigator, set the cache to clear, “Every Time” and the cache size to zero. In the Internet Explorer, set the cache to clear “Every visit to the page” and the Amount of disk space to the minimum possible which is usually 1MB.

8. Create an SSHR Background Workflow Cleanup Process
   You should remove transaction information from the temporary tables for processes that support Web transactions. To do this, include the Remove Transaction activity in the workflow process.
   See: Creating a Workflow Cleanup Process:

9. Make sure that the OSSWA Framework is installed.

10. Install the Workflow Builder on Selected Workstations
    Members of your Implementation team who will be making changes to workflow process definitions need to have the Workflow Builder installed on their workstations or available from a file server.

11. Set the Access Levels for the Predefined Workflow Item Type
    The predefined workflow item type is used as the basis for all future upgrades. Provided the access and protection levels are set correctly, you can work with the delivered item type and your configurations will not be overwritten.
    See: Updating Workflow Objects: page 6 – 3

12. Configure the HRMS applications
    Define work structures, key flexfield, descriptive flexfields, lists of values.
    See: Oracle HRMS Applications User Guide

13. Check that you now have the required tools for implementing SSHR. You should have now installed the following tools:
    • Oracle Workflow
    • Web Applications Dictionary
User Access and Workflow Set Up (SSHR)

14. Identify the Target User Groups

Before starting your implementation, it is important to identify any groups of users in your enterprise who may have different requirements. Most enterprises will differentiate between managers and other employees. In your enterprise, you may identify further distinct groups such as HR professionals, managers in a particular department, or senior managers.

15. Create the User Menus

User menus group together a number of functions. SSHR includes predefined menus for employees, managers, and system administrators, but we recommend that you create your own user menus using the seeded menus as a basis. To create user menus, use the Menu window.

See: Menus Window, (Oracle Applications System Administrators Guide)

See: Defining User Access and Menus: page 5 – 12

16. Create Self–Service Responsibilities

SSHR is supplied with predefined responsibilities, however, we recommend that you create your own responsibilities based on the seeded responsibilities. Assign a menu to them in the Responsibilities window.

See: Responsibilities Window (Oracle Applications System Administrator’s Guide)

See: Self–Service Responsibilities and User Access: page 1 – 19

17. Configure the Person Search Screens

Three tabs are displayed on the Person Search page. You can choose whether to display all these tabs or whether to hide one or more tabs from the user. You remove a tab from display in the Menu Exclusions Region of the Responsibilities window.
18. Set Up the System Profiles
You set up the security profiles to control access to information.
See: User Access and Security: page 5 – 2

19. Link the Responsibilities to Your Security Profiles
Use the System Profile Values window to link the responsibilities you have created to your security profile.

20. Set the HR: Cross Business Group Profile
If you want your managers to be able to access data for employees in other business groups, also set the HR: Cross Business Group responsibility.

21. Set the Allow Granted Access Profile
If you want managers to be able to access data for employees outside their security profile whose information has been released to them using the Release Employee Information function, also set the Allow Granted Access profile option to Yes for the responsibility.

See: Release Employee Information: page 9 – 11

22. Manually Create User Accounts
Create at least one user account manually to test the responsibilities and menus. For a small enterprise, you may choose to create all your user accounts manually and skip the next step.
See: Defining User Access and Menus: page 5 – 12

23. Configure Batch Creation of User Accounts
To create and manage the batch creation of user accounts, you must first write API user hooks. User hooks enable you to extend the predefined business rules to reflect your enterprise’s business rules. You use the user account hooks for example, to set up your customary user name and password format, responsibilities, and profile options you want to associate with a user.
See: Writing User Hooks to Create Batch User Accounts: page 5 – 20
Configuring Workflow Processes and Page Layouts (SSHR)

24. Display Your Enterprise Logo

SSHR is delivered with a default Oracle logo in the upper left hand corner of the application. You can replace this logo with your own.

Place the logo in the $OA_MEDIA/<Language> directory.

The logos are named FNDLWAPP.gif for SSHR version 3.2 and later, and FNDLOGHR for SSHR 2.0 functions.

See: Displaying a New Logo: page 7 – 12

25. Define your Email Address

Set up the email addresses for your enterprise. Set up the following addresses using the Attributes Value tab in the Workflow Builder:

- HR email address
- Training administrator email address
- Recruitment supervisor email address

See: Defining Your Enterprise’s Email Addresses: page 6 – 9

26. Configure Your National Address Style

To ensure that the correct address style for your country is used in the application, select one of the predefined address styles. The default address style is determined by the legislation of the business group. To select an address style, use the Descriptive Flexfield Segments window.

See Descriptive Flexfields and Address Styles (Oracle Applications User Guide)

27. Identify and Prioritize Required Business Flows

SSHR is delivered with a number of business flows incorporating workflow-enabled functions. First identify which business flows you need to implement for your enterprise. Consider the information flows and approval processes within your enterprise.

For each business flow, repeat steps 15 thru 26. Detailed information is available in the relevant chapters as indicated. Details of the configuration options are available for each SSHR module.

28. Configure the Workflow Process
Review the underlying workflow process in the Workflow Builder. If you wish to make changes, first copy the process so that you can make changes to the copy.

See: Self–Service Workflows: page 6 – 2

29. Configure the Approvals Process

Review the seeded approvals processes and, if necessary, configure changes in the Workflow Builder.

See: Approvals Processes: page 8 – 2

30. Configure the Workflow Error Processes

Each workflow–enabled function has an error process that runs when a system error occurs. The error process sends a notification and a description of the error to the sysadmin ID. You configure the error processes in the Workflow Builder.

See: Configuring Workflow Error Processes: page 6 – 8

31. Link the Workflow Item Type to the Function

Use the Form Functions Window and the Parameters field to link the workflow item type to functions. The Parameters field is displayed when you select the Form tab.

See: Form Functions Window, (Oracle Applications System Administrators Guide)

32. Add the Functions to the User Menu

Make sure that your configured functions are available in your user menus.

See: Defining User Access and Menus: page 5 – 12

33. Set Up User Profile Options

User profiles control how users access information and how the information is displayed. You define the profiles at either the user or responsibility level in the System Profile Values window.

See: User Profiles (Oracle HRMS Applications User Guide)

34. Test the Basic Flow

Test the workflow process to make sure that it is correct.

See: Testing a Workflow Definition (Oracle Workflow Guide)

35. Configure the Regions and Region Items for Your Functions

In the Configuration Framework and, if necessary, in the Web Applications Dictionary, configure the regions and region items.
See: Configuring Page Layouts

36. Configure Flexfields for the Regions

You can configure the flexfield structures in the Application Developer responsibility, then enable selected segments in the current region using the Configuration Framework.

See: Configuring Flexfields: page 7 – 5

37. Create Messages for the Regions

You can add predefined messages to your regions or you can create your own messages if required.

See: Adding Instructions to Web Pages: page 7 – 9
User Hooks To Generate User Names For New User Registration

As supplied, the New User Registration processes (Create New User, New Employee Registration, and Non-employee Registration) include a User ID page where users can enter a user name and password for logging on to self service. Alternatively, you can implement some additional code so that the user name and password are generated by the application when the user clicks a button on this page. You can implement this using user hooks.

There are two user hooks:

- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_B (which we will call the “Before user hook” because it runs before the user name is created)
- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_A (which we will call the “After user hook” because it runs after the user name is created)

They are called in the user api BEN_PROCESS_USER_SS_API. The user hooks communicate with this caller api through a set of globals. These globals are defined in the package BEN_PROCESS_USER_UTILITY. The usage notes within this package explain how to use the globals.

Using the Before User Hook

Use the Before user hook to set globals with user and responsibility information. To set the globals with user information, use G_FND_USER_RECORD. To associate responsibility and security group/security profile information with the user, use G_FND_RESP_RECORD. If you do not set the responsibility and security information using globals, the application uses the responsibility from the OAB:Self Registered Employee Responsibility profile option.

Minimum Setup

The minimum you need to do to create a user with today’s date as the start date is to put the following two lines in the Before user hook.

ben_process_user_utility.g_fnd_user_record.user_name := 'testuser';
ben_process_user_utility.g_fnd_user_record.password := 'testpassword';

You can also set up globals for start_date, end_date, last_logon_date, password_date, password_accesses_left, password_lifespan_accesses,
password_lifespan_days, email_address, fax, description, customer_id, and supplier_id.

**Attention:** Never set the employee_id global within the New User Registration processes. If you do so, the global overwrites the employee id created during the process and so the user will not be associated with the correct employee id. If you want to use the user wrapper api outside of the page for creating user name and password, you can then pass in the global for employee id.

### Using the After User Hook

Use the After user hook to accomplish something that needs to be done after a user is created. For example, the Before user hook enables you to pass in information about a responsibility, but it does not handle multiple responsibilities. You could pass no information about responsibility in the Before user hook and instead call the appropriate "fnd" api(s) in the After hook to take care of the responsibility, menu, or any profile value that you want to associate with the user.

Another use for the After hook might be to write code to populate some tables—such as communication or extract tables—from where you can extract the information later.
Glossary

360 Degree Appraisal  Part of the SSHR Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

360 Degree Self Appraisal  Part of the SSHR Appraisal function and also known as a Group Appraisal. This is a 360 Degree appraisal initiated by an employee. The employee (initiator) can add managers and reviewers to the appraisal.

Absence Types  Categories of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual  The recognized amount of leave credited to an employee which is accumulated for a particular period.

Accrual Band  A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Plan  See: PTO Accrual Plan

Accrual Period  The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Term  The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Activity Rate  The monetary amount or percentage associated with an activity, such as $12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium  The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.
**Administrative Enrollment** A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

**Applicant** A candidate for employment in a Business Group.

**Appraisee** A person being appraised by an appraiser.

**Appraiser** A person, usually a manager, who appraises an employee.

**Appraisal** An appraisal is a process where an employee’s work performance is rated and future objectives set. See also: Assessment.

**Appraising Manager** The person who initiates and performs an Employee–Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

**Apply for a Job** An SSHR function that enables an employee to apply, search and prepare applications for an internally advertised vacancy.

**Arrestment** Scottish court order made out for unpaid debts or maintenance payments. See also: Court Order.

**Assessment** An information gathering exercise, from one or many sources, to evaluate a person’s ability to do a job. See also: Appraisal.

**Assignment** An employee’s assignment identifies his or her role and payroll within a Business Group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is a required component for payment purposes.

**Assignment Number** A number that uniquely identifies an employee’s assignment. An employee with multiple assignments has multiple assignment numbers.

**Assignment Set** A grouping of employees and/or applicants that you define for running QuickPaint reports and processing payrolls. See also: QuickPaint Report.

**Assignment Status** For employees, used to track their permanent or temporary departures from your enterprise, and to control the remuneration they receive. For applicants, used to track the progress of their applications.

**B**

**BACS** Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

**Balances** Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers. See also: Predefined Components.

**Balance Adjustment** A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

**Balance Dimension** The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

**Balance Feeds** These are the input values of matching units of measure of any elements defined to feed the balance.
Bargaining Unit A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Currency The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Behavioral Indicators Characteristics that identify how a competence is exhibited in the work context. See also: Proficiency Level

Benefit Any part of an employee’s remuneration package that is not pay. Vacation time, employer–paid medical insurance and stock options are all examples of benefits. See also: Elements

Beneficiary A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

Block The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next. See also: Region, Field

Budget Value In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

Business Number (BN) In Canada, this is the employer’s account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Cafeteria Benefits Plan See: Flexible Benefits Program

Calendars In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. In Oracle SSP/SMP you define calendars to determine the start date and time for SSP qualifying patterns.

Calendar Exceptions In Oracle SSP/SMP you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Canada/Quebec Pension Plan (CPP/QPP) Contributions Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.
**Candidate Offers** An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

**Career Path** This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

**Carry Over** The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost. See also: *Residual*

**Cash Analysis** A specification of the different currency denominations required for paying your employees in cash. Union contracts may require you to follow certain cash analysis rules.

**Certification** Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

**Ceiling** The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

**Child/Family Support payments** In Canada, these are payments withheld from an employee’s compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

**Collective Agreement** A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

**Collective Agreement Grade** Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

**Communications** Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

**Compensation** The pay you give to employees, including wages or salary, and bonuses. See also: *Elements*

**Compensation Object** For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation objects include programs, plan types, plans, options, and combinations of these entities.

**Competence** Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude or an attribute.

**Competence Evaluation** A method used to measure an employees ability to do a defined job.

**Competence Profile** Where you record applicant and employee accomplishments, for example, proficiency in a competence.

**Competence Requirements** Competencies required by an organization, job or position. See also: *Competence, Core Competencies*
**Competence Type**  A group of related competencies.

**Configurable Forms**  Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

**Consolidation Set**  A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

**Contact**  A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

**Contract**  A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

**Contribution**  An employer’s or employee’s monetary or other contribution to a benefits plan.

**Core Competencies**  Also known as Leadership Competencies or Management Competencies. The competencies required by every person to enable the enterprise to meet its goals. See also: *Competence*

**Costable Type**  A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

**Costing**  Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

**Court Order**  A ruling from a court that requires an employer to make deductions from an employee’s salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority. See also: *Arrestment*

**Database Item**  An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

**Date To and Date From**  These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field. See also: *DateTrack, Effective Date*

**DateTrack**  When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date. See also: *Effective Date*

**Dependent**  In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

**Deployment Factors**  See: *Work Choices*
**Derived Factor** A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

**Descriptive Flexfield** A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications. See also: *Key Flexfield*

**Developer Descriptive Flexfield** A flexfield defined by your localization team to meet the specific legislative and reporting needs of your country. See also: *Extra Information Types*

**Direct Deposit** The electronic transfer of an employee’s net pay directly into the account(s) designated by the employee.

**Distribution** Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

**Effective Date** The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window. See also: *DateTrack*

**EIT** See: *Extra Information Type*

**Electability** The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are eligible for benefits do not always have electable benefit choices based on the rules established in a benefit plan design.

**Elements** Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

**Element Classifications** These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

**Element Entry** The record controlling an employee’s receipt of an element, including the period of time for which the employee receives the element and its value. See also: *Recurring Elements, Nonrecurring Elements*

**Element Link** The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element. See also: *Standard Link*

**Element Set** A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

**Eligibility** The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is eligible for benefits must also satisfy electability requirements.
Employee Histories An SSHR function for an employee to view their Training History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.


Employment Insurance (EI) Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee’s contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Employment Equity Occupational Groups (EEOG) In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Enroll in a Class An SSHR function which enables an employee to search and enroll in an internally published class. An employee can also use this function to maintain their competencies.

Enrollment Action Type Any action required to complete enrollment or de-enrollment in a benefit.

Entitlement In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

ESS Employee Self Service. A predefined SSHR responsibility.

Event An activity such as a training day, review, or meeting, for employees or applicants.

Expected Week of Confinement (EWC) In the UK, this is the week in which an employee’s baby is due. The Sunday of the expected week of confinement is used in the calculations for Statutory Maternity Pay (SMP).

Extra Information Type (EIT) A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country. See also: Developer Descriptive Flexfield

Field A view or entry area in a window where you enter, view, update, or delete information. See also: Block, Region

Flex Credit A unit of “purchasing power” in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to “purchase” benefits plans and/or levels of coverage within these plans.
Flexible Benefits Program  A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to “purchase” these benefits plans and/or coverage levels.

Flexible Spending Account (FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use–it–or–lose it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form  A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components. See also: Block, Region, Field

G

Global Value  A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type  A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade  A component of an employee’s assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparison  A comparison of the amount of compensation an employee receives with the mid–point of the valid values defined for his or her grade.

Grade Rate  A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale  A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required. See also: Pay Scale

Grade Step  An increment on a grade scale. Each grade step corresponds to one point on a pay scale. See also: Grade Scale

Grandfathered  A term used in Benefits Administration. A person’s benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group  A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees’ eligibility for certain elements, and to regulate access to payrolls.

Group Certificate  In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year.

H

Hierarchy  An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

I
**Imputed Income**  Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

**Initiator**  In SSHR a person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

**Input Values**  Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element’s run result. You can define up to fifteen input values for an element.

**Instructions**  An SSHR user assistance component displayed on a web page to describe page functionality.

---

**K**

**Key Flexfield**  A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups. See also: Descriptive Flexfield

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**L**

**Leave Loading**  In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

**Leaver’s Statement**  In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee’s entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

**Legal Employer**  A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

**Life Event**  A significant change in a person’s life that results in a change in eligibility or ineligibility for a benefit.

**Life Event Collision**  A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

**Life Event Enrollment**  A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

**Linking Interval**  In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.
Linked PIWs  In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee’s entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

LMSS  Line Manager Self Service. A predefined SSHR responsibility.

Long Service Leave  Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

Lookup Types  Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL)  In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

Maternity Pay Period  In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Menus  You set up your own navigation menus, to suit the needs of different users.

Medicare Levy  An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

N

NACHA  National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

National Identifier  This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

M

Manager–Employee Appraisal  Part of the SSHR Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.
National Occupational Classification (NOC) code In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Net Accrual Calculation The rule that defines which element entries add to or subtract from a plan’s accrual amount to give net entitlement.

Net Entitlement The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements Elements that process for one payroll period only unless you make a new entry for an employee. See also: Recurring Elements

North American Industrial Classification (NAIC) code The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

Not in Program Plan A benefit plan that you define outside of a program.

Oracle FastFormula An Oracle tool that allows you to write Oracle HRMS formulas without using a programming language.

Organization A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

OSSWA Oracle Self Service Web Applications.

OTM Oracle Training Management.

P

Pattern A pattern comprises a sequence of time units that are repeated at a specified frequency. Oracle SSP/SMP uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale A set of progression points that can be related to one or more rates of pay. Employee’s are placed on a particular point on the scale according to their grade and, usually, work experience. See also: Grade Scale

Payment Type There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.
Glossary

Payroll  A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

People List  An SSHR line manager utility used to locate an employee.

Performance (within Assessment)  An expectation of “normal” performance of a competence over a given period. For example, a person may exceed performance expectation in the communication competence. See also: Proficiency (within Assessment), Competence, Assessment.

Period of Incapacity for Work (PIW)  In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less then the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period Type  A time division in a budgetary calendar, such as week, month, or quarter.

Person Search  An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type  There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is ‘External’. You can create your own user person types based on the eight system types.

Personal Public Service Number (PPS)  The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

Personal Tax Credits Return (TD1)  A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee’s wages for federal/provincial taxes.

Plan Design  The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor  The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Position  A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components  Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Professional Information  An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.
Glossary – 13

Proficiency (within Assessment) The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level. See also: Performance (within Assessment), Competence, Assessment

Proficiency Level A system for expressing and measuring how a competence is exhibited in the work context. See also: Behavioral Indicators.

Progression Point A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale. See also: Pay Scale

Provincial/Territorial Employment Standards Acts In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

Provincial Health Number In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan A benefit in which employees enroll to entitle them to accrue and take paid time off. The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

Qualification Type An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test. See also: Competence

Qualifying Days In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern See: SSP Qualifying Pattern

Qualifying Week In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number In Canada, this is the employer’s account number with the Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire An SSHR function which records the results of an appraisal.

QuickPaint Report A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want. See also: Assignment Set

Q

QPP (See Canada/Quebec Pension Plan)
Rates A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rating Scale Used to describe an enterprise’s competencies in a general way. You do not hold the proficiency level at the competence level. See also: Proficiency Level

Record of Employment (ROE) A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

Recurring Elements Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links. See also: Nonrecurring Elements, Standard Link

Region A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window. See also: Block, Field

Registered Pension Plan (RPP) This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP) This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Report Parameters Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set A group of reports and concurrent processes that you specify to run together.

Requisition The statement of a requirement for a vacancy or group of vacancies.

Request Groups A list of reports and processes that can be submitted by holders of a particular responsibility. See also: Responsibility

Residual The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit. See also: Carry Over
**Responsibility**  A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities. See also: Security Profile, User Profile Options, Request Groups, Security Groups

**Retry**  Method of correcting a payroll run or other process before any post-run processing takes place. The original run results are deleted and the process is run again.

**Revenue Canada**  Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministere du Revenu du Quebec.

**Reviewer (SSHR)**  A person invited by an appraising manager to add review comments to an appraisal.

**Reversal**  Method of correcting payroll runs or QuickPay runs after post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

**Rollback**  Method of removing a payroll run or other process before any post-run processing takes place. All assignments and run results are deleted.

**Search by Date**  An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

**Salary Basis**  The period of time for which an employee’s salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

**Scheduled Enrollment**  A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

**Security Group**  Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security. See also: Responsibility, Security Profile, User Profile Options

**Security Groups Enabled**  Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

**Security Profile**  Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users’ responsibilities. See also: Responsibility

**Self Appraisal**  Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

**SMP**  See: Statutory Maternity Pay

**Social Insurance Number (SIN)**  A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).
Source Deductions Return (TP 1015.3) A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee’s wages.

Special Information Types Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

SSHR Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP See: Statutory Sick Pay

SSP Qualifying Pattern In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard Link Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link. See also: Element Link, Recurring Elements

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1) A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Remuneration and Expenses (TD1X) In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Maternity Pay In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Standard HRMS Security The standard security model. Using this security model you must log on as a different user to see a different Business Group.

Statutory Sick Pay In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Succession Planning An SSHR function which enables a manager to prepare a succession plan.
Suitability Matching  An SSHR function which enables a manager to compare and rank a person's competencies.

Superannuation Guarantee  An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

Tabbed Regions  Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows  A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Terminating Employees  You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Rule  Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips  An SSHR user assistance component that provides information about a field.

User Assistance Components  SSHR online help comprising tips and instructions.

User Balances  Users can create, update and delete their own balances, including dimensions and balance feeds. See also: Balances

User Profile Options  Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements. See also: Responsibility, Security Profile

Viewer (SSHR)  A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

WCB Account Number  In Canada, this is the account number of the provincially administered Worker’s Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Waiting Days  In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.
**Work Choices** Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person’s capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

**Worker’s Compensation Board** In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Worker’s Compensation Board premiums are paid entirely by the employer.

**Workflow** An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

**Work Structures** The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.
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